

Concord Deals Management CRM Free Download

Concord V1.0 Deals Management CRM Free Download.. Concord is an affordable self-hosted CRM web-based application, with a one-time fee and can help your company.. [DemoDownload](#)

Rating: Not Rated Yet

Price

[Report Copyright about this product](#)

Description

Concord V1.0 Deals Management CRM Free Download

Concord is an affordable self-hosted CRM web-based application, with a one-time fee and can help your company to easily manage and organize deals/leads, contacts, and companies, and have a clear overview of the next actions that need to be taken to successfully close a sale.

With its intuitive design and easy to use features crafted with care, you can organize your sales workflow as your company requires, with custom pipelines, stages that can be tailored specifically for your company needs, advanced filters that can be used to segment your data, tables that can be customized, custom fields, 2-way email synchronization, and 2-way calendar synchronization with Google Calendar and Outlook Calendar, is the perfect self-hosted CRM solution.

In today's time, it's important for every company that does sales to use a CRM in order to increase its productivity, Concord CRM can help you be more productive, close deals faster, organize your sales daily tasks and increase your company revenue, with our activities feature, you can create follow-up activities, add custom reminders for you or your team members, filter deals without any activities, with upcoming or activities that are due and needs to be finished, and never forget to call the client again. Each activity can be linked to many companies, contacts, and deals, everytime you visit their profiles, you will be able to tell the next action that needs to be taken.

With the built-in API, you can create deals, contacts, and companies from any third-party service, if you are not that techy to use an API, you can always use the CSV import feature with fields mapping, as an additional feature to create deals, you can create web forms that can be embedded on your website, the deal and the contact will be automatically created once the web form is submitted from your potential client that visited your website.

Documentation

Main: <https://www.concordcrm.com/docs>

Deals Management

Create custom and multiple pipelines, manage deals and track the deal progress via stages with custom win probability that can be tailored to fit any company sales workflow. Includes deals kanban with drag and drop, custom card color, and advanced filters that will help you to focus on what matters next.

Advanced Filters

You can use advanced filters to segment your data and easily identify the next step your sales reps need to take, save filters and re-use them for later, share them with other team members or mark your favorite filter as default. And one more thing, you can filter by the custom fields you added as well.

Customizable Fields

The default fields are not suitable for your requirements? You can create new custom fields, and re-order the existing and hide fields as per your needs. You can tailor your Concord CRM as your business requires.

Contacts & Companies Management

Manage and create an unlimited number of companies and contacts, add notes, record calls and have a clear overview of all the deals, past communication, and notes. Save time and start managing your companies and contacts via Concord CRM.

Send Emails

Concord CRM has a built-in email client that you can use to communicate with your clients directly from the dashboard or the contact profile. Stop going forward and backward to your existing CRM and email client. Emails can be associated with contacts, companies, and deals and be available directly in their profiles.

Activities & Reminders

Our activities feature is crafted for your workflow and will help to increase company productivity, create follow-up activities, add custom reminder dates for you or your team members, add comments, and never forget to call the client again.

2-way calendar synchronization

Stop trying to sync calendar events manually, sync your Concord CRM activities to Google Calendar or Outlook Calendar automatically anytime an activity is created or updated.

Products

Concord is a CRM with a products management feature, create products that your company is selling to potential clients and insert the predefined products in deals so you and your sales reps can have a clear overview of what products the deal is related to and auto-update the deal total amount based on the added products.

Roles & Permissions

Organize your sales reps with different roles and permissions. You can choose what the sale representative can see and manage when logged-in in the Concord CRM dashboard.

Automation Workflows

Do you need to assign an activity when a deal enters a specific stage or when a company is created? Or make an HTTP request to an external service? This can be automated just with a few clicks.

Embeddable Web Forms

Stop adding contacts and deals manually, embed web forms on your websites, and let the contacts come as they visit your website. Create an unlimited number of lead web forms and integrate the form on your website or share the link directly. Once the form is filled, the deal will be created in your Concord CRM dashboard.

Mentions

@mention team members in notes, calls, comments and collaborate faster. After a team member is mentioned, he will receive an email and notification in the Concord CRM dashboard.

1 Click Update

Time is valuable, for this reason, we added 1 click update feature that will update your Concord CRM installation to the latest version whenever a new version with new features and bug fixes is released, no more manually copying files.

Patcher

Concord CRM consists of a patcher feature to help resolve bugs and provide small enhancements easily without releasing a new version just to fix a small bug. Providing patches to our customers when an issue exists is our top priority in order to provide you with the best experience when working with Concord CRM.

Powerful insights

Concord CRM dashboard allows you to see what is happening in your company and how the sales reps are handling the deals, if the default dashboard is too bloated for you, there is the ability to create separate dashboards with your favorite insights cards and mark the dashboard as default.

Make Calls & Log Calls

You can log and associate calls with records, for example, you can log calls on deals, contacts, and companies. Use our Twilio integration to make calls via Concord CRM, it's that simple, just a click to make a call and take notes directly on the contact profile while talking on the phone.

Saved Mail Templates

Use the mail templates feature to create common answers for your frequently received emails. Answer the emails you receive blazingly fast with only few clicks.

Translator

Multi-language support out of the box, you can translate Concord CRM and use it in different languages, with our built-in translator translate your Concord CRM installation directly via the dashboard, no more manually editing files.

- Version 1.0.0 – Initial release
- Deals management feature
- Contacts management feature
- Companies management feature
- Deals kan-ban with multiple pipelines
- Products management
- Activities managements, reminders, calendar
- 2-way calendar synchronization (Outlook Calendar, Google Calendar)
- Email client (Gmail, Outlook, IMAP)
- Advanced filters and filtering
- Import and export feature with fields mapping
- Custom fields
- Advanced tables with orderable fields and custom sorting
- Automation workflows
- Call logs & in-app calling
- Notes feature for the core resources
- Deal/Lead web form
- Roles & Permissions
- Zapier integration
- Customizable dashboard
- Integrated API
- 1 Click update & Patcher
- Add sale reps in different timezones
- Send sale reps invite
- API & API keys generation
- Fully responsive