



For Education

~~Per User Licences~~
Include Everyone!

**START MY FREE
TRIAL**

Since 2010, Engage CRM have worked with independent training providers, Colleges and Universities to deliver enterprise CRM solutions. Our aim is to provide high-quality customised solutions using Open Source software.

Using the built-in developer tools we are able to customise your system with new fields, dropdowns, modules, automatic processes and more! With our internal and external developers, we can develop your system outside of the in-house tools.

There are also compatible plug-ins for integrating Websites, Calendars, Outlook, Gmail, invoicing systems and more! If you have a bespoke system you need to connect to, we can create custom API integrations designed & built to match your requirements.



Our Education clients include...

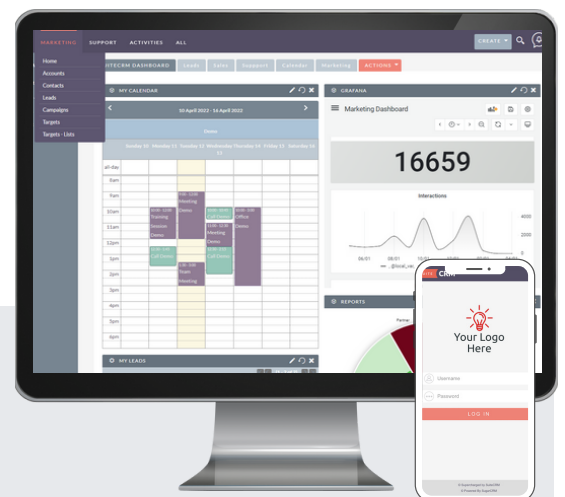


Choose the right plan for you...

 £100 Per Month Simple Plan Get started	 £350 Per Month Business Plan Get started	 £1000 Per Month Premium Plan Get started	 Contact Us Platinum Plan Get in Touch
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"EngageCRM has saved me so much time when managing vacancies, working with employers and signing up new learners, especially connecting to Docusign for E-signatures, we have reduced our average sign-up to under an hour!"

- Kara Jell - Business Development Officer
- Green Labyrinth Training



Try EngageCRM for free...

No credit card, no subscription, no risk!

START MY FREE TRIAL

Stay Connected!





Explore all Features and Popular Plug-ins!

Get Started

Recommended Users
Supported Users
Annual Support Hours
Annual Training Sessions
Server Performance (IOPS)
Storage

Simple Plan From £100 P/M

Business Plan From £350 P/M

Premium Plan From £995 P/M

Platinum Plan

5 - 15	15 - 50	50 +	150 +
2	5	7	10
20	60	120	200
1	5	15	25
300	600	600	1,200 - 2,500
5 GB	30 GB	100 GB	150 GB

	Simple	Business	Premium	Platinum
Marketing and Lead Management				
Lead Management	✓	✓	✓	✓
Web-to-CRM Forms	✓	✓	✓	✓
*Lead Scoring	£	£	£	✓
Lead Automation and Assignment	✓	✓	✓	✓
Duplicate Detector	✓	✓	✓	✓
Mass Email	£	£	✓	✓
*SMS and WhatsApp	£	£	£	£
Campaign Management	✓	✓	✓	✓
Advanced Surveys	✓	✓	✓	✓
*Mailchimp	£	£	£	£
Email Templates	✓	✓	✓	✓
Events and Attendees	✓	✓	✓	✓
*Eventbrite	£	£	£	£
Contacts, Companies and Sales				
Contact and Account Management	✓	✓	✓	✓
Opportunity Management	✓	✓	✓	✓
Customise your Sales Process	✓	✓	✓	✓
*Kanban Views	£	£	✓	✓
Call Logging	✓	✓	✓	✓
Task Management	✓	✓	✓	✓
Activities & History Feed	✓	✓	✓	✓
Shared Calendar	✓	✓	✓	✓
Recurring Meeting Scheduler	✓	✓	✓	✓
*Google Map Connector	£	£	✓	✓
*Companies House Sync	£	£	£	£
*Telephone and VOIP Integration	£	£	£	£
Rule-based Onboarding Process	£	£	£	£
Documents and Signatures				
Document Upload	✓	✓	✓	✓
Document Version Control	✓	✓	✓	✓
PDF Generate	✓	✓	✓	✓
*Advanced Mail Merge	£	£	£	✓
*Docusign	£	£	£	£
Pricing, Billing and Contracts				
Products and Price Management	✓	✓	✓	✓
Quotes	✓	✓	✓	✓
Contracts	✓	✓	✓	✓
Invoices	✓	✓	✓	✓
Purchase Orders	✓	✓	✓	✓
*Inventory Management	£	£	£	£
*2 Way Sync with Accountancy Software e.g. Xero or QuickBooks	£	£	£	£

	Simple	Business	Premium	Platinum
Cases and Portal				
Case Management	✓	✓	✓	✓
Case Thread and Email Notifications	✓	✓	✓	✓
Knowledge Base	✓	✓	✓	✓
*Customer Portal	£	£	£	£
*Zendesk	£	£	£	£
Reporting and Dashboards				
Report Builder	✓	✓	✓	✓
Customisable User Dashboard	✓	✓	✓	✓
*Grafana Dashboards - Templates	£	£	✓	✓
*Grafana Dashboards - Bespoke	£	£	£	✓
*Dashboard Copier	£	£	£	✓
Users, Groups and Permissions				
Unlimited Users	✓	✓	✓	✓
Roles and Permissions	✓	✓	✓	✓
Field Audit Log	✓	✓	✓	✓
*Advanced Field Audit Log	£	£	£	✓
Security Groups - Group Layouts - Sudo Login	£	£	£	✓
Field Level Permissions	£	£	£	£
Developer Tools and Customisations				
Themes for Each User	✓	✓	✓	✓
Developer Tools	✓	✓	✓	✓
Add and Edit Fields	✓	✓	✓	✓
Change Views and Layouts	✓	✓	✓	✓
Module Builder	✓	✓	✓	✓
Workflows	✓	✓	✓	✓
Calculated Fields	✓	✓	✓	✓
Advanced Workflows (WOLF)	£	£	£	✓
Connect Your Favourite Apps				
Full REST API	✓	✓	✓	✓
SAML Login	£	£	✓	✓
Email *Outlook 365, Gmail	£	£	£	£
Socials *Linkedin, Twitter, Facebook	£	£	£	£

Key

- * - Approved Plugin
- ✓ - Included
- £ - Additional

Need More Help?

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- [Terms and Conditions](#)
- [Privacy Policy](#)

Contact Us

Tel: 01793 236246

Email: info@engagocrm.co.uk

Address: 1 Milton Road, Swindon, SN1 5JE





Education Features Include:

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	Simple	Business	Premium	Platinum
Student Management				
Students	✓	✓	✓	✓
Evidence & Documents	✓	✓	✓	✓
Online Applications	£	£	£	✓
Enrolments	✓	✓	✓	✓
Learning Aims	✓	✓	✓	✓
Job Placements	£	£	✓	✓
Student Portal	£	£	£	✓
Events & Courses				
Courses	✓	✓	✓	✓
Attendees & Actions	£	£	£	✓
Course Surveys	✓	✓	✓	✓
Exam Booking	✓	✓	✓	✓
Tutors, Teachers and Mentors				
CPD	✓	✓	✓	✓
Accident Log	✓	✓	✓	✓
Caseload Management	✓	✓	✓	✓
Apprenticeships				
Components & Milestones	£	£	✓	✓
OTJT Calculator	✓	✓	✓	✓
Finance				
Incentives & Bursary	✓	✓	✓	✓
Employer Contribution Calculator	✓	✓	✓	✓
Staff Expenses	✓	✓	✓	✓
Purchase Orders	£	£	✓	✓



What our customers say..

"We have organised all our processes using the CRM system. We have gone from utilising multiple spreadsheets of data into one central database with full support from EngageCRM."

The system has improved productivity, organisational processes and fundamentally our client relationships.

The team at EngageCRM are friendly, knowledgeable and always trying to help us find new and innovative ways of making our working day easier.

They have helped us change every element of the Business Development Unit (BDU), from how we take a call, to how we support our customers and now, the EngageCRM team have become an extension of the BDU.

Thanks to all the team at EngageCRM, especially Taufique, Sam and Martin – you have made our job easier and saved us time. What more could we ask for!"

- Jayne Jones - Business Development Manager
- NPTC Group

[Read the full case study now](#)



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No credit card, no subscription, no risk!
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