Since 2010, Engage CRM have worked with organisations of all shapes & sizes within many different industries. Our aim is to provide high quality customised solutions using Open Source software. We evaluate every client's initial requirements and produce a personalised implementation plan based on your priorities.

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

There are also compatible plugins 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.
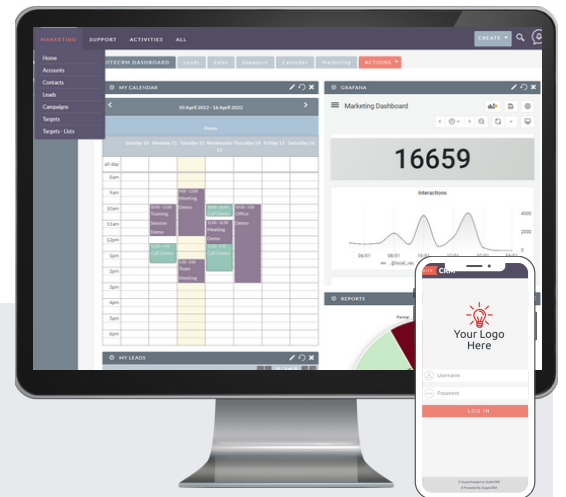
Choose the right plan for you...

£100 Per Month	**£350** Per Month	**£1000** Per Month	**Contact Us**
Simple Plan	**Business Plan**	**Premium Plan**	**Platinum Plan**
Get started	Get started	Get started	Get in Touch

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

- Jayne Jones - Business Development Manager
- NPTC Group
Read the full case study now

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Get Started

	Simple Plan From £100 P/M	Business Plan From £350 P/M	Premium Plan From £995 P/M	Platinum Plan
Recommended Users	5 - 15	15 - 50	50 +	150 +
Supported Users	2	5	7	10
Annual Support Hours	20	60	120	200
Server Performance (IOPS)	300	600	600	1,200 - 2,500
Storage	5 GB	30 GB	100 GB	150 GB

Marketing and Lead Management	Simple	Business	Premium	Platinum
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	Simple	Business	Premium	Platinum
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	Simple	Business	Premium	Platinum
Document Upload	✅	✅	✅	✅
Document Version Control	✅	✅	✅	✅
PDF Generate	✅	✅	✅	✅
*Advanced Mail Merge	£	£	£	✅
*Docusign	£	£	£	£

Pricing, Billing and Contracts	Simple	Business	Premium	Platinum
Products and Price Management	✅	✅	✅	✅
Quotes	✅	✅	✅	✅
Contracts	✅	✅	✅	✅
Invoices	✅	✅	✅	✅
Purchase Orders	✅	✅	✅	✅
*Inventory Management	£	£	£	£
*2 Way Sync with Accountancy Software e.g. Xero or QuickBooks	£	£	£	£

Cases and Portal	Simple	Business	Premium	Platinum
Case Management	✅	✅	✅	✅
Case Thread and Email Notifications	✅	✅	✅	✅
Knowledge Base	✅	✅	✅	✅
*Customer Portal	£	£	£	£
*Zendesk	£	£	£	£

Reporting and Dashboards	Simple	Business	Premium	Platinum
Report Builder	✅	✅	✅	✅
Customisable User Dashboard	✅	✅	✅	✅
*Grafana Dashboards - Templates	£	£	£	£
*Grafana Dashboards - Bespoke	£	£	£	£
*Dashboard Copier	£	£	£	✅

Users, Groups and Permissions	Simple	Business	Premium	Platinum
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	Simple	Business	Premium	Platinum
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	Simple	Business	Premium	Platinum
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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