



# Cirrus Insight

## Choosing the Best Sales Tool

Prepared for \_\_\_\_\_ by \_\_\_\_\_.

# Email Sync



Automatically relate emails to all of the Leads/Contacts on the email via Shared Activities in Salesforce

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Automatically or selectively sync all sent and received emails into Salesforce related to leads and contacts

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Save attachments into Salesforce

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Save Google Drive attachments into Salesforce as hyperlinks

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Save attachments to a Salesforce Chatter feed on any object including Opportunities, Cases, and custom objects

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Automatically sync emails to the most recently created or modified Opportunity, Case, or Campaign related to the Contact or Account in Salesforce

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Choose to only save specific emails to Salesforce

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Choose to not sync internal emails

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Choose to not sync emails from specific domains and/or specific email addresses

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Choose to relate emails to any record under any object in Salesforce including Opportunities, Cases, and custom objects

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Choose to save an email to Salesforce and automatically save future emails on that thread into Salesforce

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See emails in Salesforce with arrows to indicate sent versus received email

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Choose to enable email sync for Office 365 or Google Apps via web account dashboard

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## Email Templates & Mail Merge

Create new email templates in Gmail and Outlook with Salesforce merge tags

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Use existing Salesforce email templates

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Merge data from standard and custom fields in Salesforce into emails in Gmail and Outlook

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Mail merge to up to 500 recipients at a time in Gmail

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Mail merge from a Salesforce report or list view

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Track recipient opens, hyperlink clicks, and replies on every campaign

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Set follow up reminders on emails sent via mail merge

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Schedule a mail merge for a future date and time

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Automatically sync emails in a mail merge to related Leads or Contacts in Salesforce

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Send a mass email from your company's email server , not a third party server

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Manually remove people from my campaign after a stage sends, but before the next stage

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Send to 500 people at a time

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Include multiple stages in a drip campaign

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Build a drip campaign without leaving Gmail.

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Set conditional filters based on activity for each stage of a drip campaign (i.e. "send next email in 3 days if no reply").

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Upload contacts via a .csv file.

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Add a CC or BCC to a drip campaign.

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Use HTML rich formatting for my email content (i.e. layout, images, hyperlink).

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Preview each stage of my drip campaign.

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# Email Productivity



Track when recipients open your emails including information about the date, time, location, and device

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Track when recipients click hyperlinks in your emails

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Track when recipients reply to your emails

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Schedule emails to send on a specific date and time

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Set follow up reminders for specific times and/or if a recipient doesn't reply to your email

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Return emails to your inbox if you haven't received a reply

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Get real-time open notifications in Gmail when people open and click links in your email

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Choose automatically to ignore internal email opens

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Automatically capture contact information from an email signature when creating a new Lead or Contact in Gmail or Outlook

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2-Click installation from the Cirrus Insight homepage

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# Salesforce Integration



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Create and update any Salesforce record from the inbox including Leads, Contacts, Accounts, Opportunities, Cases, Campaigns, and custom objects

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Support for record types, required fields, dependent pick lists, and validation rules

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Administrator can edit which Salesforce fields are available to users in Gmail and Outlook

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Instant lookups of relevant Salesforce leads, contacts, accounts, activities, opportunities, and more in the inbox.

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Integrate with dozens of third-party applications including Marketo, Pardot, HubSpot, Zendesk, Desk.com, Jobscience, and more

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Integrate third-party Visualforce applications into Gmail and Outlook including Geopointe, LevelEleven, TaskRay, and SMS Magic

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View and update Chatter on any Salesforce record from the inbox

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Administrator account dashboard to manage users and settings

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# Sales Analytics



Track every record created via Cirrus Insight inside Salesforce

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Measure email opens, hyperlink clicks, and replies in Salesforce

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Automatically create follow up tasks in Salesforce

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Leaderboards for Email Tracking, Email Sync, Calendar Sync, Email Templates, Mail Merge Campaigns, Leads, Contacts, Accounts, Opportunities, Cases, Tasks, and Salesforce Adoption

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Ability to create Workflow Rules and/or Lightning Process Builder Flow alerts for email opens, hyperlink clicks, or any other action

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Ability to create Workflow Rules and/or Lightning Process Builder Flow alerts for email opens, hyperlink clicks, or any other action



## Book Meetings & Calendar Sync



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Insert your calendar availability into an email in Gmail, Outlook, or Mobile so the recipient can schedule a meeting with you in one click

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Share your public calendar link by email and social and on the web so a prospect or customer can choose a time to meet with you

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Automatically sync appointments from Google Calendar or Outlook Calendar with Salesforce

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Automatically sync Events from Salesforce to Google Calendar or Outlook Calendar

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Automatically relate appointments to invited and attending Leads and Contacts in Salesforce

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Automatically supports creating, updating, and deleting events on mobile calendars on any device including iPhone, iPad, Android, Microsoft, Blackberry, etc.

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Supports recurring events

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Stay connected to Salesforce from the inbox

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Sync contacts from Salesforce to Google contacts

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Supports all-day and multi-day events

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Choose to suppress sync for events designated as private

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Choose to suppress sync for specific domains

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Choose to not sync internal events

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Choose to sync only events with specific labels in Google Calendar (e.g. blue events)

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Choose to relate events to any Salesforce record from Google Calendar

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Update Salesforce Fields, Pick Lists, and Notes from Google Calendar

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Choose to automatically sync events to the most recently created or modified Opportunity, Case, or Campaign related to the Contact or Account in Salesforce

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Choose to enable calendar sync for Office 365 or Google Apps via web dashboard

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