



An overview of the best CRM for real estate



What is Freshsales



Freshsales is a sales CRM for teams who don't want to juggle between multiple tools. It offers everything a salesperson needs—built-in phone and email, lead scoring, customizable reports, event tracking and a visual sales pipeline—in one single platform.

Why Freshsales is the best CRM for Real Estate business



**Built-in phone
and email**



**Get smarter
with email**



**Find the best
sales leads**



**Customize your
sales process**



**Manage sales
pipeline better**



**Automate actions
using workflows**

Key Features for Real Estate Agents



Easy and effective communication

- Email, Phone and Chat
- Schedule Tasks, Appointments and Reminders
- Calendar

Manage contacts and clients

- Lead and Deals management

Automation routine activities

- Workflows

Forecast sales and assess team performance

- Reports

Use the CRM to track customer journey

- Website and In-app Tracking

Use business apps with the CRM

- Integrations

Access all details from the CRM on the go

- Mobile App



 freshsales

Easy and effective communication



SEND EMAILS RIGHT FROM THE CRM



Connect your work email with Freshsales CRM. Don't juggle inboxes. Have all conversations right from the CRM and also have a copy of it in your work inbox.

The image shows a Gmail inbox on the left and a CRM interface on the right. The Gmail inbox lists four emails from Andrew Green, Wesley Vinken, Gareth Deakin, and Simon Darling, all with subject lines related to 'Require a demo?'. The CRM interface shows a 'RECENT CONVERSATIONS' section with three entries corresponding to the first three emails in the Gmail inbox, displaying the sender's name, email address, and the start of the message content.

Sender	Subject	Date
Andrew Green	Re: (Sample) Re: Require a demo? - awesome, Best running, - Andrew Andrew Green EdgeGear, Co-founder www.getedgegear.com	On Tue Ma 12:17 pm
Wesley Vinken	Follow up on Indoor Navigation at your next event - Hello Jane, I am writing to follow up on my email from last week, since I didn't hear back ye	May 18
Gareth Deakin	Re: (Sample) Re: Require a demo? - Hi Jane Hope you are well and I am really sorry for the delay in getting back to you. We implemented a new	May 17
Simon Darling	Re: (Sample) Re: Require a demo? - Very happy to help On Fri May 12 2017 10:25:22 GMT+00:00, Jane Sampleton (sample) <janesampleton@>	May 13

Sender	Subject	Date
Andrew Green<andrewgreen@gmail.com>	Require a Demo? Hi Jane, Could we decide a date and time to have the demo of your product. Would be great if we can set some time up within next week. Thanks	4 days ago
Wesley Vinken<wesleyvinken@gmail.com>	Welcome onboard! Follow up on Indoor Navigation	4 days ago
Gareth Deakin<garethdeakin@gmail.co...>	Require a Demo? Opened Hi, Would need a demo on the email features of your software. Could we fix up some time next..	7 days ago

EMAIL TRACKING



Get real-time notifications on email opens and clicks, and plan your next course of action.

The screenshot shows an email inbox with three entries. Each entry includes a checkbox, a profile picture, the sender's name and email address, and the time it was received. Tracking data is overlaid on the first two emails. The first email, from Blair Malet, has 'Opened' and 'Clicked' status indicators. The second email, also from Blair Malet, has 'Opened' and 'Clicked' status indicators. A tooltip is visible over the second 'Opened' indicator, showing a list of two open events: one from blairmalet@gmail.com at 06:58 PM on Apr 19, 2016, and another from blairmalet@gmail.com at 12:23 PM on Apr 20, 2016. The third email, from Jane Sampleton, is partially visible and has a 'Forward to deliver...' link.

Sender	Time	Status
Blair Malet <blairmalet@gmail.com>	2 days ago	Opened, Clicked
Blair Malet <blairmalet@gmail.com>	3 days ago	Opened, Clicked
Jane Sampleton <janesampleton@...>	4 days ago	Forward to deliver...

ONE CLICK TO CALL



No extra software/hardware costs. Just place calls with one click from inside Freshsales using the built-in phone.

The screenshot displays the Freshsales CRM interface. On the left, a lead profile for Jane Sampleton is shown, including her name, title (VP Finance - Widgetz.io), phone number ((368) 493-2360), and a 'Make a Phone call' button. A 'Call in progress..' overlay is visible over the phone number field. On the right, a 'RECENT CONVERSATIONS' panel shows three messages from Rebecca Moris to Jane Sampleton, with timestamps and status indicators.

Leads > Jane Sampleton

Jane Sampleton (99)
VP Finance - Widgetz.io

Phone number: (368) 493-2360 (W) **Make a Phone call**

Source: [dropdown]
Owner: Rebecca Moris
Customer Status: Trial
Signup Date: 5 days ago

RECENT CONVERSATIONS (View all (0))

- Jane Sampleton** (Yesterday at 11:03 PM for 12m)
From: Rebecca Moris via +12093643248
To: +17205155958
Duration: 2:20 / 12:00
- Jane Sampleton** (Yesterday at 6:02 PM for 13m 10s)
From: Rebecca Moris via +12093643248
To: +17205155958
Duration: 3:23 / 13:10
- Rebecca Moris** (4 days ago)
Welcome to Capinvoice [Opened]
Hello Jane, We're thrilled to have you on board and we look forward to delivering ...

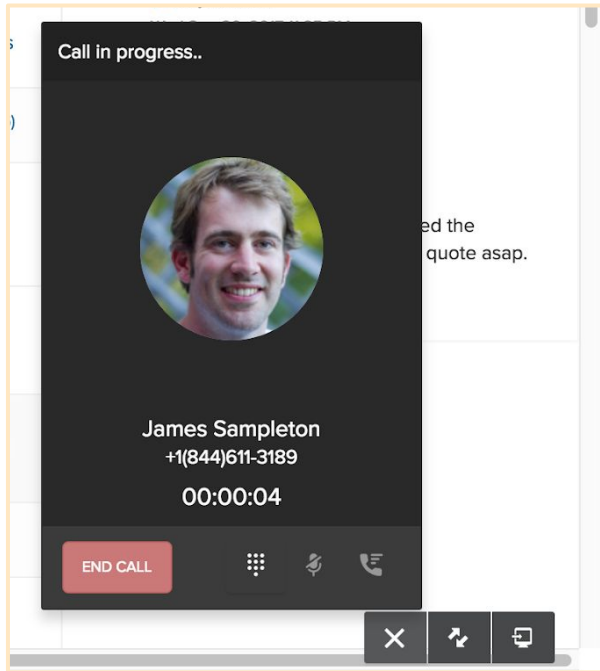
Call in progress..

Jane Sampleton
+(368) 493-2360
00:00:22
ENDCALL

AUTOMATIC AND MANUAL CALL LOGGING



Freshsales can log all incoming and outgoing calls. Both automatic and manual call logging available.



CALL LOG ✕

From : Rebecca Moris via +13852130849

To : +1(844)611-3189

Call type * outgoing

Associate this phone call with ? * Existing Contact

Name * James Sampleton

Existing Number Work Number+1(844)611-3189 Mobile Number+919940459565

Notes

Enter your notes

CHAT WITH POTENTIAL CUSTOMERS



Respond instantly to website visitors and add them as leads in the CRM using Freshchat.

The screenshot shows a chat window for John Besley. The chat history includes:

- John Besley: "Hey Freshsales, I would like to know more about your pricing plans?" (12:07 PM)
- Agent: "Hello John,"
- Agent: "Sure, will share it with you shortly."
- Agent: "Can you give more context on your company and your business? This would help me suggest the most suitable plan and features for you?" (12:30 PM)

The chat interface includes a search bar, a sidebar with navigation icons, and a 'New' dropdown menu.

Sync chat to conversation
in CRM

The screenshot shows the contact profile for John Besley in the CRM. The profile includes:

- Contact Information:** VP sales, Hoolington, New Jersey, USA.
- Owner:** umh
- Department:** Sales enablement
- Email:** johnbesley@judlesen.com
- Work:** 8769567562
- Mobile:** 1326754385
- Status:** Qualified Lead
- Has authority:** No
- Do not disturb:** No
- Time zone:** (GMT-08:00) Pacific Time (US & Canada)
- Address:** No 5/7, Baker Street
- Zipcode:** 456789
- Source:** Chat

The profile also shows a 'LEAD SCORE' of 7 and a 'Last seen' status. Below the profile, there are sections for 'RECENT CONVERSATIONS' and 'TIMELINE'.

VIEW ALL CONVERSATIONS IN THE CRM



Link all email, phone and chat conversations to leads / contacts in the CRM

The screenshot displays a CRM interface for a contact named James Sampleton. On the left, a vertical timeline lists various activities: 'Deal created Gold account Cap Invoice' (2 minutes ago), 'Need a demo' (yesterday at 12:32 PM), 'Added a user' (yesterday at 1:48 PM), 'Configured CapInvoice settings' (2 days ago), 'Visited feature page' (2 days ago), 'Outgoing call' (2 days ago, 13:23 to 15:20), 'Visited pricing page' (4 days ago), 'Visited home page' (4 days ago), and 'Introducing CapInvoice!' (4 days ago). Two callouts point to specific items: 'Email conversation' points to the 'Need a demo' email, and 'Phone call log' points to the 'Outgoing call' entry. On the right, a 'LEAD SCORE' card shows a score of 97, with 'Last seen: yesterday', 'Last contacted: yesterday', and 'Last modified: 2 days ago'. Below this is a 'FILTER' section with a 'Date range' of 19/02/2016 to 25/02/2016 and a list of activity types: Website visits, Events, Emails, Phone calls, Appointments, Tasks, and Lifecycle events, each with a selection checkbox.

APPOINTMENT, TASKS, FILES AND NOTES



Schedule appointments, make quick notes , share files & collaborate with team on tasks.

NOTES TASKS APPOINTMENTS FILES

Start typing...




Start typing...

✓

- Role: Sales Manager Team size: 7 Interested in Sprout plan
Keira
Tue Aug 22, 2017 10:05 PM
- Role: Sales Manager Team size: 7 Interested in Sprout pl
Rebecca Moris
Tue Jul 25, 2017 01:27 AM
- Role: Sales Manager Team size : 5 Outbound sales
Rebecca Moris
Mon Jun 26, 2017 02:25 AM

NOTES TASKS APPOINTMENTS FILES

+ Add file

-  Invoice.png
Craig Middleton
Fri Dec 09, 2016 03:07 AM
image/png - 505.64 KB
-  Price Quotation .png
Rebecca Moris
Thu Oct 26, 2017 03:19 AM
image/png - 81.34 KB
-  Import requirements.png
Rebecca Moris
Thu Oct 26, 2017 03:26 AM
image/png - 129.59 KB

NOTES TASKS APPOINTMENTS FILES

+ Add task

Overdue

- (Sample) Send the proposal document
Mohammeda
Fri Jun 03, 2016 01:00 AM

Later

- Webinar slot to be booked for James
Sally Houston
Thu Nov 02, 2017 10:00 AM

Completed

- Send "Best use cases Guide"
Rebecca Moris
Fri Oct 20, 2017 10:00 AM

Hide all completed tasks

CALENDAR SYNC



Sync all your appointments between your Google and Office account and Freshsales.

[CONNECT YOUR EMAIL](#) **[SYNC YOUR CALENDAR](#)** [EMAIL SETTINGS](#) [NOTIFICATIONS](#) [API SETTINGS](#) [OTHER SETTINGS](#)

SYNC A CALENDAR OF YOUR CHOICE



Google Calendar



Office365



 freshsales

Manage contacts and clients



MANAGE YOUR CONTACTS AND CLIENTS



Easily store and pull out your client information (prospects, landlords and tenants) when you want to reach out to them. Access customers' social profiles and identify customer touchpoints from a single screen.

The screenshot displays a CRM contact profile for James Sampleton. The profile includes a profile picture, name, title (CEO at Widgetz.io), and social media links. Key financial metrics are shown: \$4,500 with 2 open deals and \$1,200 with 1 won deal. Contact details include phone number (+473-160-8261), email (jamesampleton@gmail.com), and location (San Diego, CA). Business information includes source (Organic Search), owner (Rebecca Moris), current product (CapBill), renewal date (in a year), and MRR (500,000). The profile also shows customer status (New), contacts attempted (2), and payment mode (Online). A 'RECENT CONVERSATIONS' section lists three messages: a text message about a demo, a voicemail from Rebecca Moris, and an email from Rebecca Moris introducing CapInvoice.

Contacts > James Sampleton Add deal

James Sampleton
CEO • [Widgetz.io](#)

\$ 4,500
2 open deals

\$ 1,200
1 won deal

Phone number	+(473)-160-8261 (W)	Email	jamesampleton@gmail.co...
Source	Organic Search	Time zone	Pacific Time (US & Canada)
Owner	Rebecca Moris	Location	134 Baker St San Diego CA 92093 USA
Current Product	CapBill	Customer Status	New
Renewal Date	In a year	Contacts Attempted	2
MRR	500000	Payment Mode	Online

[View and edit all fields](#)

NOTES TASKS **APPOINTMENTS** FILES

Add appointment

Today

- Demo of CapInvoice**
Rebecca Moris
in 4 hours

Later

- Meeting with James**
Rebecca Moris
in 20 days

[View all past appointments](#)

RECENT CONVERSATIONS [View all \(24\)](#)

- James Sampleton**
Yesterday at 12:32 PM
Need a Demo
Hey Rebecca, My team and me absolutely love the product. But, we do have some questions and requirements. How about scheduling a meeting on Wednesday?
Thanks! James Sampleton
- James Sampleton**
2 days ago 5m 12s
From: Rebecca Moris via +14692511923
To: +473-160-8261
0:10 / 0:14
- Rebecca Moris<becklemoris@gma...**
4 days ago
Introducing CapInvoice Opened Clicked
Hello James, Hope you are enjoying using CapBill and we are excited to introduce o...

NEVER LET YOUR DEALS FALL THROUGH THE CRACKS



Monitor progress on open deals in one view with visual sales pipeline.
Instantly connect with prospects, directly using the deals dashboard.

The screenshot shows a CRM interface with a visual sales pipeline. At the top, there are navigation tabs for 'Deals' and 'Open Deals'. Below this, a header bar allows users to 'Sort deals by:' with options for 'Deal stage', a list icon, and a calendar icon. A dropdown menu is open, showing 'Inbound Pipeline', 'Inbound Pipeline', and 'Outbound Pipeline'. To the right, there are filters for 'Rebecca Moris' and 'Import deals'. The main area is divided into five columns representing deal stages: 'New' (\$19,700, 5 deals), 'Call Scheduled' (\$12,100, 4 deals), 'Contacted' (\$20,200, 4 deals), 'Demo' (\$27,200, 5 deals), and 'Negotiation' (\$16,300, 2 deals). Each column contains several deal cards. Each card displays the deal title, value, company name, and the user's name (Rebecca Moris) with a timestamp. Below each card, there is a '1 related contact' link and icons for email and phone. A yellow callout bubble on the right points to the 'Filter & sort' header area. Another yellow callout bubble on the right points to the contact icons on a deal card, with the text 'Call or mail instantly'.

Filter & sort

Call or mail
instantly

MULTIPLE DEAL PIPELINES



Create multiple pipelines to separate your sales processes. Create relevant stages and choose your own default pipeline.

Admin Settings > Pipelines

CONFIGURE PIPELINE

Define up to 10 custom pipelines with different deal stages to suit each sales process in your business! ⓘ

Inbound Pipeline	Outbound Pipeline	Sales pipeline	e - Commerce
New	New	Prospecting	New
Call Scheduled	Contact Attempted	Setting the appointment	Added to cart
Contacted	Contact Established	Qualifying	Order confirmed
Demo	Verbal Commitment	Presenting	Shipping initiated
Negotiation	Negotiation	Meeting	Product delivered
Won	Won	Won	Payment made
Lost	Lost	Lost	Won
			Lost

[+ Add deal stage](#) Marked as default

[+ Add deal stage](#) Marked as default

[+ Add deal stage](#) Marked as default

[+ Add deal stage](#) Marked as default



 freshsales

Automate routine activities



WORKFLOWS



Automate repetitive tasks, streamline processes and be more productive with intelligent workflows.



Send Emails



Create follow-up
tasks



Use WebHooks to
connect to other apps



Automatically update
records

WORKFLOWS



Set up personalized response that addresses concerns and provides valuable information depending whether they want to buy or sell. Also, Automatically send a reply that tells the client that you have received the message or set follow-up tasks.

Workflow Name *
Create follow-up task after site visit

Description
Follow-up with potential buyers after site visit

WHICH RECORD TYPE DOES THIS WORKFLOW APPLY TO?

Lead Contact Account Deal

WHEN DO YOU WANT TO EXECUTE THIS WORKFLOW?

Execute
When record is created or updated

Perform actions on a record
 execute once
 execute multiple times

WHAT CONDITIONS SHOULD TRIGGER WORKFLOW ACTIONS?

AND OR

Deal Property Deal stage Is in Inside Sales : Site Visit

Add condition

WHAT ACTION TO BE PERFORMED?

Create Task Follow up with the buyer

Add action

Cancel Save



Forecast sales and assess team performance



CUSTOMIZE REPORTS



Use standard reports or create custom reports to pull out any data from the CRM. You can also schedule and export reports and share it quickly across your teams

The screenshot shows a report configuration page for 'Leads By Stage And Business Type'. It includes sections for 'REPORT DETAILS', 'FILTERS & GROUPING', 'PREVIEW DATA', and 'CHARTS'. Under 'CHARTS', there is a 'Chart Type' selector with icons for various chart types, where a bar chart icon is highlighted. Below this is the 'Chart Data' section with dropdowns for 'X-axis' (Number of), 'Y-axis' (Business type), and 'Grouping' (Lead stage). A 'lead' dropdown is also visible. On the right, there are buttons for 'Edit report' and 'Export as CSV'. A context menu is open over the 'Edit report' button, showing options: 'Edit report', 'Run report', 'Schedule', and 'Delete'.

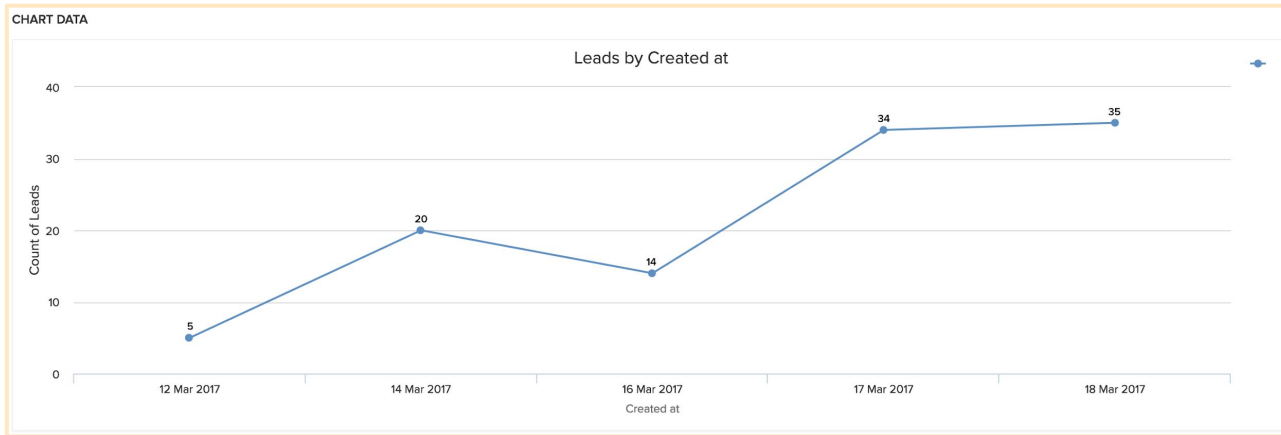
Custom reports

Schedule & Export

TRENDLINE REPORTS



Evaluate sales by time. Create reports to identify lead/deal trends over weekly, monthly, quarterly and yearly time periods.



Last week's leads:
Grouped on daily basis

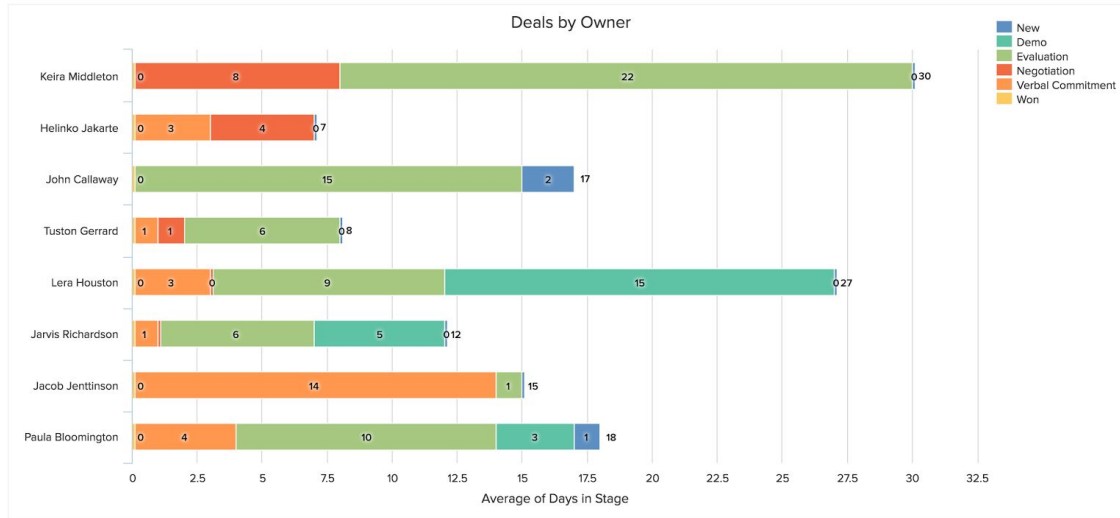
SALES CYCLE AND VELOCITY REPORTS



Find out how long your team is taking to close opportunities. Identify the stages where your reps spend most of their time in the sales cycle.

Sales velocity

CHART DATA



Sales cycle

TABULAR DATA

OWNER		GRAND TOTAL
Lisdon Thompson	Average Age (in days)	3
	Record Count	6
Terry Mathew	Average Age (in days)	1
	Record Count	6
Drake Freeman	Average Age (in days)	6
	Record Count	10
Sarah Jordan	Average Age (in days)	0
	Record Count	11
Taylor Krislet	Average Age (in days)	4
	Record Count	7
GRAND TOTAL	Average Age (in days)	0
	Record Count	38

SALES ACTIVITY REPORTS



Create sales reports for four key activities: emails, calls, tasks, appointments. Use the sales CRM to get key metrics like email opens and clicks, tasks created versus tasks completed, and number of outgoing calls made by each rep.

The screenshot shows a CRM interface with a breadcrumb trail 'Reports > Phone Calls'. On the left is a sidebar menu with categories: Categories, Leads, Leads and Converted Leads, Contacts, Accounts, De..., En..., Phone Calls (highlighted in yellow), Tasks, and Appointments. The main content area displays a list of reports:

- Website phone activity report** Private
Created by: Rebecca Moris • 10 days ago
- Phone Activity Report**
View the stats of phone calls made by your team
Created by: Jacob • 5 months ago | Last modified by: Rebecca Moris • 11 days ago
- All Outgoing Calls**
Created by: Sarah • 2 months ago
- Manual Call Logs**
Created by: Jacob • 2 months ago
- All Phone Calls**
Created by: Klaudan • 2 months ago

DASHBOARDS



View multiple reports in a single screen with live customizable reports dashboard.
Follow the status of your sales at anytime through schedule and export options



- Create Dashboard
- Schedule dashboard
- Export as PDF



Use the CRM to track your customer journey



WEBSITE & IN-APP TRACKING



Track your prospects and know how they interact with your website and product. Plan smart, relevant conversations, and use it to configure lead scores to cherry pick the hot leads.

In-app tracking

Website visits

The screenshot displays a CRM interface for a contact named James Sampleton. The left sidebar shows a list of activities with icons for deal creation, need a demo, adding a user, configuring settings, visiting pages, outgoing calls, and introducing CapInvoice. The main content area shows a detailed activity timeline for 'Today', including: 'Deal created Gold account Cap Invoice' by Rebecca Moris 2 minutes ago; 'Need a demo' from James Sampleton yesterday at 12:32 PM; 'Added a user' by James Sampleton yesterday at 1:48 PM; 'Configured CapInvoice settings' by James Sampleton 2 days ago; 'Visited feature page' by James Sampleton 2 days ago; 'Outgoing call' to Rebecca Moris (+12093643248) 2 days ago, with a duration of 13:23 to 15:20; 'Visited pricing page' by James Sampleton 4 days ago; 'Visited home page' by James Sampleton 4 days ago; and 'Introducing CapInvoice!' by Rebecca Moris 4 days ago, which was opened and clicked. On the right, a 'LEAD SCORE' card shows a score of 97, with 'Last seen: yesterday', 'Last contacted: yesterday', and 'Last modified: 2 days ago'. Below this is a 'FILTER' section with a 'Date range' of 19/02/2016 to 25/02/2016 and a list of activity types: Website visits (checked), Events (checked), Emails (checked), Phone calls (checked), Appointments (unchecked), Tasks (unchecked), and Lifecycle events (checked).



 freshsales

Use business apps with the CRM



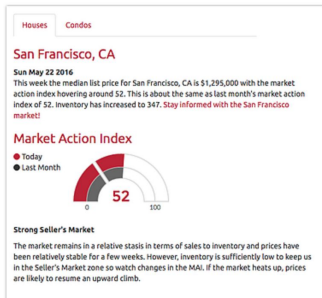
ALTOS INTEGRATION



Share market related information with buyers and sellers. Integrate Altos or other market research tools with Freshsales to instantly send reports to your clients.



Readable Reports - Not Just Numbers Quick snapshot of the market.



Real-Time Market Profile At-a-glance view of market indicators.

Real-Time Market Profile			
Never miss important changes in the San Francisco market.			
Median List Price	\$1,295,000	↔	
Asking Price Per Square Foot	\$766	↔	
Average Days on Market (DOM)	21	↔	
Properties with Price Decrease	13%	↔	
Percent Relisted (reset DOM)	3%	↔	
Percent Flip (price increased)	6%	↔	
Inventory	347	↔	
Most Expensive Listing	\$28,500,000	↔	
Least Expensive Listing	\$272,070	↔	
Market Action Index	52	↔	
Strong Seller's Market			
↔	Strong Upward Trend	↔	Strong Downward Trend
↑	Slight Upward Trend	↓	Slight Downward Trend
↔	No Change		

Share market reports
directly from
Freshsales

NOTES TASKS APPOINTMENTS FILES

+ Add file

- Real Estate Report.pdf**
Richard R
Mon Jul 30, 2018 12:15 AM
application/pdf - 905.82 KB
- California Real Estate Market Profile.pdf**
Richard R
Mon Jul 30, 2018 12:17 AM
application/pdf - 1.51 MB

INTEGRATIONS



Collaborate all your data inside the CRM with our built-in and third-party integrations.



Upcoming



 freshsales

Access all deals on the go

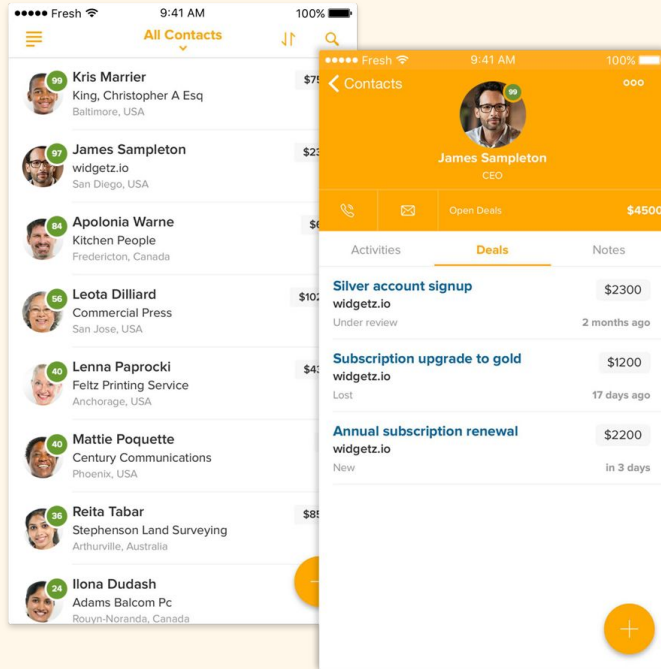


MOBILE APP

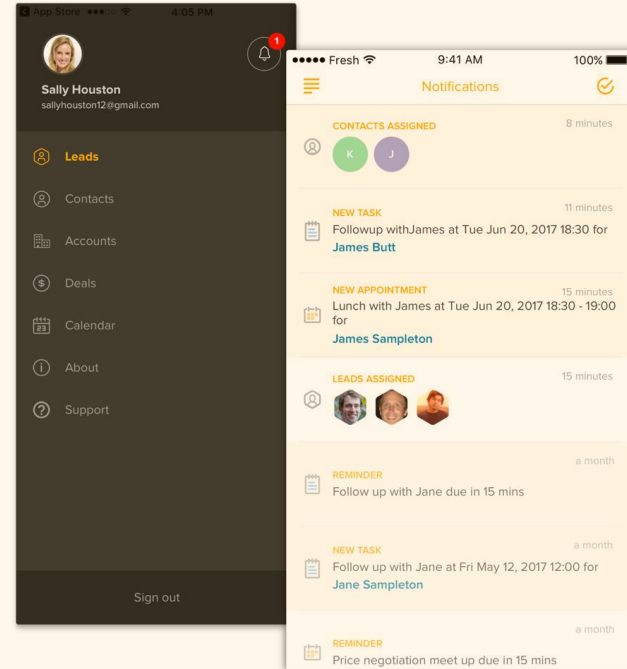


Get a 360° view of your customer on the go with Freshsales Android and iOS apps.

Stay up-to-date on your mobile



Push notifications

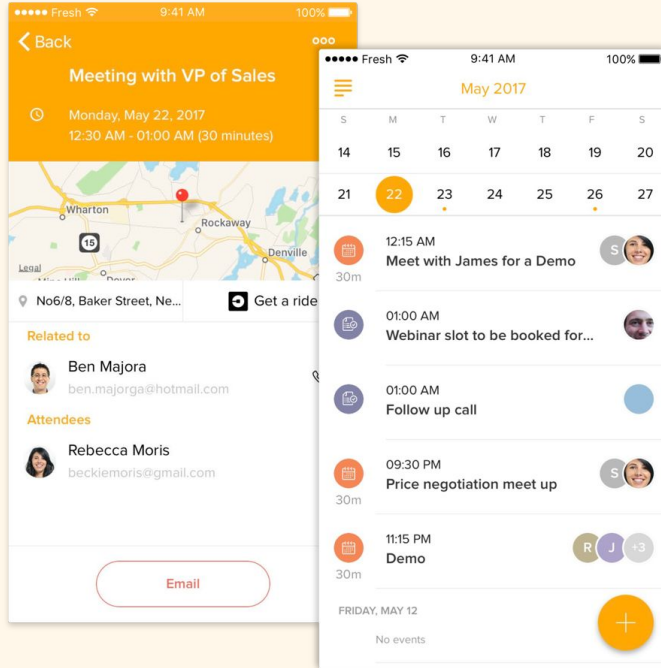


MOBILE APP

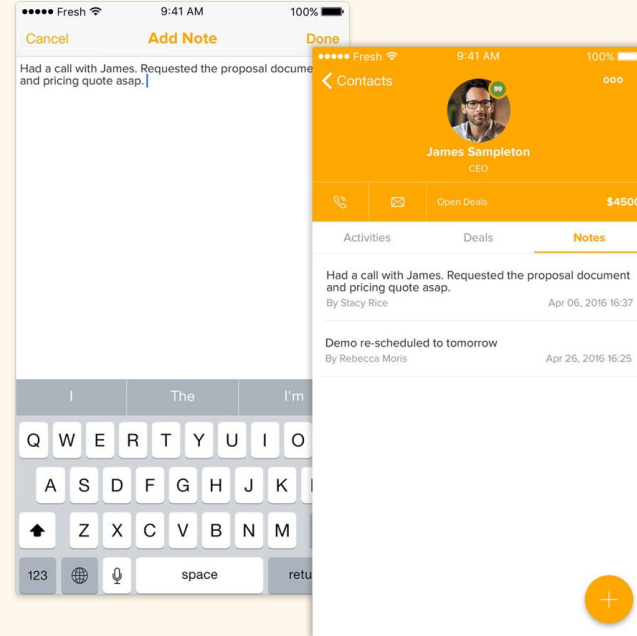


Plan your day, from your smartphone.

Google calendar, maps & uber integration



Add notes, tasks and appointments





CUSTOMER'S THOUGHTS

“

“Freshsales helps us prioritize and focus on our opportunities. We’re able to customize our pipeline, from deal stages to filters, unique to our business process. Other CRMs did not allow us to do this as intuitively and flexibly as Freshsales does.”

Brian Engles, Director of Partnerships



“

“Freshsales is an affordable and easy to implement CRM, even for a small business like mine.”

Steve Kolb, Owner and Lead Driving Instructor



13000+ CUSTOMERS

dyson

MYLES
DRIVE YOURSELF

WallyPark
AIRPORT PARKING

INTUO

PURDUE
UNIVERSITY

**PRECIA
MOLEN™**
WORLDWIDE WEIGHING

G grabyo

celexon™

cse software inc.

DEVINITI



 support.freshsales.io

 +1 (866) 832-3090

 support@freshsales.io