

Freshsales (by Freshworks)

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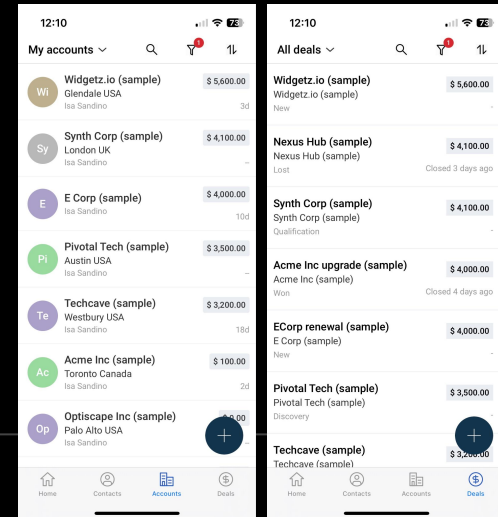
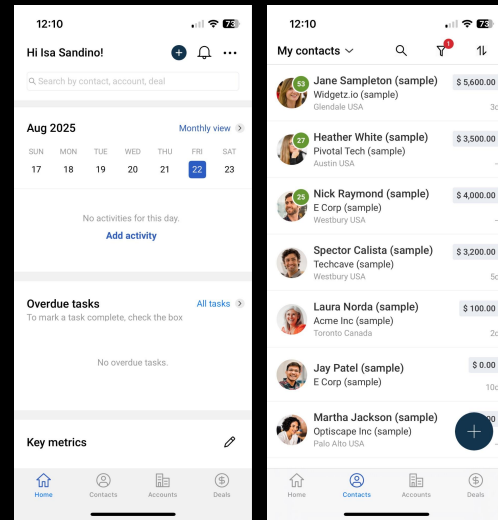


About:

The Freshsales software application is a customer relationship management (CRM) platform available as both a web-based application and a mobile-friendly app for both iOS and Android devices. Freshsales is made to help businesses organize and track their customer interactions by managing contacts, accounts, business deals, activities, and communications. Those who have the app can also add in their email and calendar to the platform. This, in turn, helps users have greater effectiveness in scheduling and consistency.

A free tier or trial is available, which makes it accessible to those with smaller organizations or people who would like to try out the tools before needing to pay and continue paying. Things that are available in the free version are contact and deal management, pipeline tracking, and basic forecasting. Paid plans have built-in phone and email functions, AI-driven lead scoring, and workflow automation. Freshsales mixes with other products in the Freshworks suite, which creates a connected system for sales and customer management.

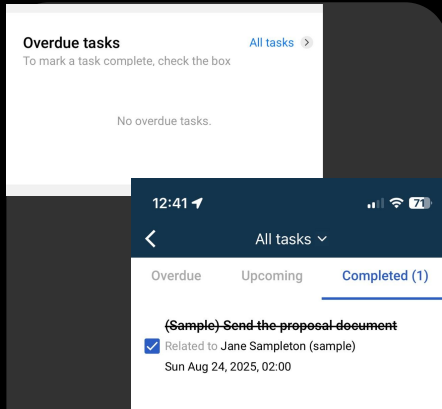
All together, Freshales is made to support decision-making in ways such as lead prioritization, deal progress tracking, and predicting potential revenue outcomes. It is affordable, user friendly and offers many features.(TechRadar, 2025)



Features:

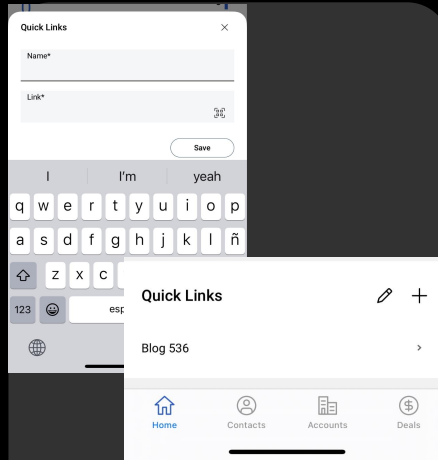


Overdue Tasks



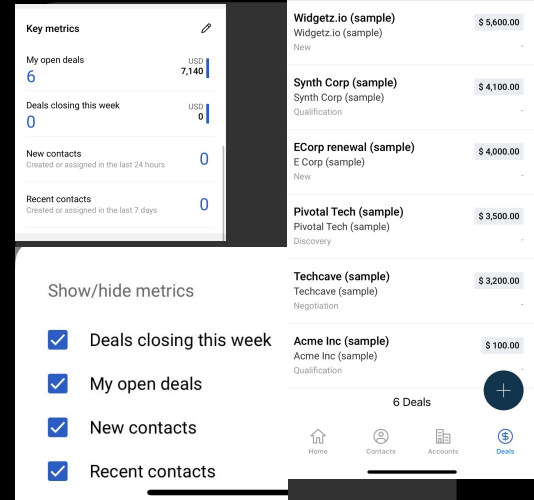
This feature keeps users in check to not fall behind of their calendars. If they do, they can make sure they get them done by having a section for them to cross them off and see if there are any close to the deadline (upcoming).

Quick links



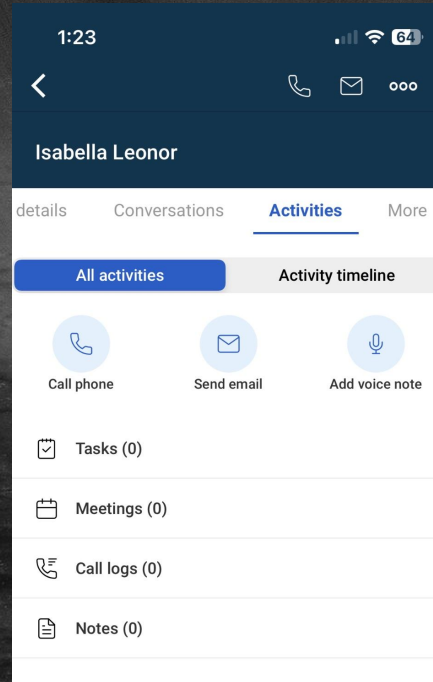
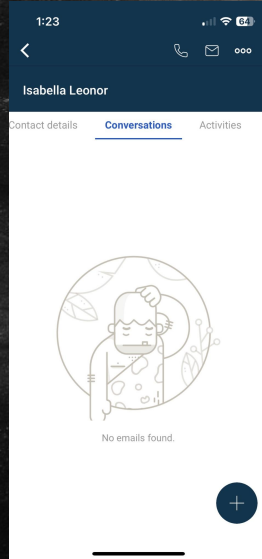
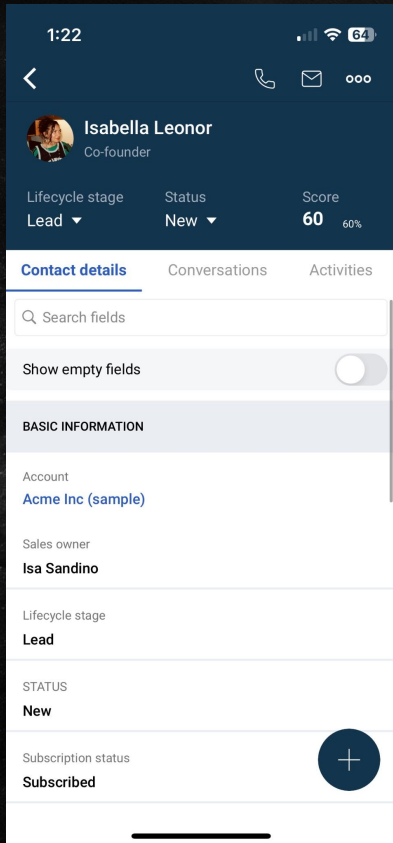
Users can add their links and titles to them on their dashboard to make navigating the site easier and quicker.

Key metrics



These are dashboard widgets, such as revenue forecasts, that help users stay up to date on their decision-making and connections. They can choose what shows on their dashboard or not.

Data structure:



Within Freshsales, users can create their contacts and link them directly to the associated accounts and deals. This structures a summary of each customer relationship. A contact profile can include personal details such as their email address, phone number and related organizations, and also include specific notes, scheduled tasks, upcoming meetings, call logs, and voice notes. Freshsales also tracks their status, such as lead score and lifecycle stage, which help users know where a customer currently stands in the sales process (PCMag, 2025). This structure makes sure that all relevant information is put together within a single profile, minimizing the user from switching between separate tools or data sources.

Connections to other software:

Freshsales can be connected to many other e-commerce sites. The most popular is Shopify. Middleware tools are helpful to connect such as Zoho Flow, Zapier, or Make.

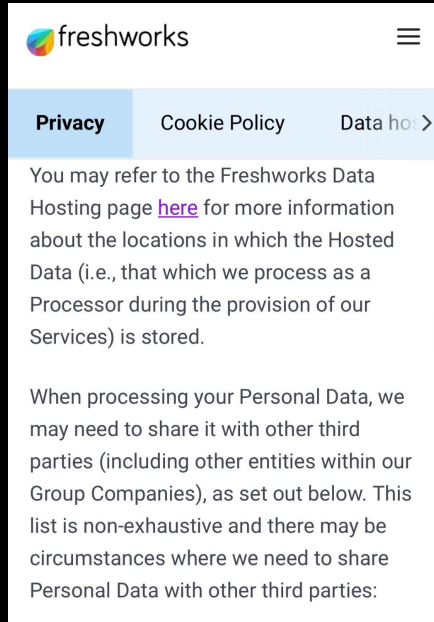


shopify

These websites help assist users to automate workflows, such as starting new deals in Freshsales when purchases are placed on Shopify, syncing customer and product information, and managing updates to orders and inventory.

Connecting to e-commerce sites strengthens the sites efficiency because it connects sales data from online stores directly into the CRM. In turn, this reduces manual entry and keeps all customer records centralized and current. (Zoho Flow, 2025)

Privacy implications:



Freshsales does store personal information, such as contact information, meeting notes, and call logs, but it protects them all well. The site has tools to control where that information goes, like role-based permissions and account logins. According to the UK Government's Digital Marketplace, Freshsales is certified under ISO/IEC 27001. Basically, it means it meets international security standards, so the information is safe. Freshsales also tests their software for flaws, runs code reviews, and maintains a secure process for operating security issues quickly (Digital Marketplace, 2025).

Where this Privacy Notice refers to "Freshworks", "we", "us", "our", this means one or more of the particular Group Companies that provide the particular Website, Mobile Application, Newsletter or Services to you, recruits you, uses testimonials from you, sends marketing communications to you, hosts an event you visit, or organizes a program in which you participate.

Even though these are helpful tools for protection, at the end of the day, Freshsales holds very private data. I personally always get nervous when apps have critical information for only me because hackers are a relevant today. For that reason, it would be wise for users to add their own safety steps, such as strong and unique passwords (that they won't forget) and multi-factor authentication, to keep their information secure.