

TrueLynk Platform Features



Account Setup & Admin

	ACCESS	BASIC	GROWTH	PRO	ENTERPRISE
Users Management	✓	✓	✓	✓	✓
Advisors Management	✓	✓	✓	✓	✓
Roles & Visibility Management	✓	✓	✓	✓	✓
Client Intelligence (for Advisors)	✓	✓	✓	✓	✓
Co-Management Rights	✓	✓	✓	✓	✓
User Setting Preferences	✓	✓	✓	✓	✓

Leads & Contact Sharing

Leads Management	✓	✓	✓	✓	✓
Lead Gen Types (Hands-On, Intro, Outreach)	✓	✓	✓	✓	✓
Relationship Ratings	✓	✓	✓	✓	✓
Add Tags & Organize Leads	✓	✓	✓	✓	✓
Logos Generator	✓	✓	✓	✓	✓

Matching & Targeting

Search for Client-Advisor Match	✓	✓	✓	✓	✓
Search Filters (Saved Filters)	✓	✓	✓	✓	✓
Targets Management & Prioritization	✓	✓	✓	✓	✓
Targets Approval Process	✓	✓	✓	✓	✓
Key Contact Details Sharing	✓	✓	✓	✓	✓

Insights & Pipeline Syncing

Shared Insights	✓	✓	✓	✓	✓
Dashboards with Drag & Drop	✓	✓	✓	✓	✓
Pipeline Board & List Views	✓	✓	✓	✓	✓
Pipeline Export	✓	✓	✓	✓	✓
Email Notifications based on Settings	✓	✓	✓	✓	✓

Collaboration & Tasks

Tasks & Projects Management	✓	✓	✓	✓	✓
Collaborative Workflows & Sharing	✓	✓	✓	✓	✓
Email Templates	✓	✓	✓	✓	✓
Hyperlinks to Google Docs & Others	✓	✓	✓	✓	✓