Intellicom

INTELLICOM · BUSINESS SOFTWARE



Intellicom CRM

Every lead and deal, in one clear view

Intellicom CRM gives your sales team one place to capture leads, track deals and keep every email, call and WhatsApp message together. It replaces scattered inboxes and spreadsheets so no enquiry is forgotten and you can see where each deal stands.

MADE FOR

- Small and mid-sized sales teams
- Sales managers who need a clear pipeline
- Businesses that win work by phone, email and WhatsApp
- Companies that quote from a product list

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WHAT YOU CAN DO

Put it to work from day one

01 Capture leads from web forms, emails, WhatsApp messages and Facebook lead ads

02 Convert leads into deals with contacts and organisations saved automatically

03 Move deals through stages on a drag-and-drop Kanban board

04 Keep emails, call logs with recordings and WhatsApp messages on each deal

05 Create quotations from the products added to a deal

06 Forecast and review lead sources and loss reasons on a dashboard

INSIDE THE PRODUCT

Key features

Lead and deal management

- All-in-one lead and deal page with activities, comments, notes and tasks
- Lead conversion to deals with multiple currencies
- Product-based deal values
- Kanban, list and grouped views
- Custom views with filters, sorting and columns

Communication

- Calling from the CRM with call recording through Twilio or Exotel
- WhatsApp messages sent and received in the CRM
- Emails kept on each deal
- Reusable email templates

Automation and follow-up

- Automatic assignment and updating of deals
- Tasks for follow-ups
- First-reply SLAs for new leads
- Prompt for a reason when a deal is lost
- Import of leads, deals, contacts and organisations from CSV or Excel

Setup and access

- Custom fields and renamable stages without code
- Permissions that control who sees which leads and deals
- Mobile browser access and a mobile app for deals and tasks
- Sales dashboard with forecasting

BETTER TOGETHER

Works with your other Intellicom systems

> **Intellicom ERP**
> Extends the CRM into quotations, invoicing and accounting.

GETTING STARTED

How we get you running

01

Discover

We learn how your business runs today and agree what the system must do.

02

Configure

We set it up around your processes, documents and approvals.

03

Move and train

We bring your existing data across and train the people who will use it.

04

Go live and grow

We switch you over, stay close in the first weeks and add more as you grow.

THE INTELLICOM SERVICE

We run it, you use it

Hosted for you

Runs on Intellicom-managed servers in South Africa, so your data stays in the country and there is nothing to install.

Set up around your business

We configure it to match how you already work and bring your existing data across.

Looked after

Backups, updates and monitoring are handled by our team, so your people can get on with their jobs.

Training and local support

We train your team and stay on call, with support from people in Cape Town who know your system.

See Intellicom CRM in action

Ask us for a demonstration and a quote tailored to your business.
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