

CRM, quotes, orders and support

The sales and service side of IntellX, on the same record as the customer's services and bills.

CRM and pipeline

- Prospects and deals through a pipeline, with a source on every deal.
- Deals can have more than one owner, with commission shares.
- Tasks, targets, renewals, account health and dashboards.

Quotes and e-signing

- Quotes priced from your catalogue, with discounts and margin per line.
- A branded PDF and an online view-and-accept link, with sent, opened and accepted status.
- Order forms signed in the browser. An accepted quote becomes a won deal and an order.

Orders

- Checklists by product type so every step is done.
- Supplier update emails tick off steps and update dates automatically.
- Customers are emailed when dates are set or change.

Support tickets

- Customer replies, supplier conversations and internal notes on one ticket.
- Service levels measured in UK working hours, with alerts.
- Customers can follow and raise tickets in the portal.

Talk to us. Email info@intellx.co.uk or visit intellx.co.uk. Pricing is agreed with each provider, based on the modules and hosting you choose.