iConnect CRM

Keep the customer relationship with your business

For business owners, sales directors and admins who need one trusted customer record

Controlled rollout: shown on demonstration data; scope and timing are agreed in your proposal.

Does this sound familiar?

Customer details sit on personal phones, spreadsheets and private inboxes. Nobody can see who spoke to a customer last or where a deal stands.

Follow-ups are missed, customers repeat themselves at every hand-off, and context leaves with the person who held it.

From the problem to the business gain

Conceptual illustration, not a product screen

The problem	What your team does	What you get	What the business gains
Customer details scattered across phones and files	Keep contacts, activity and deals on one record	One shared record per customer	Hand-offs without lost context

Three practical gains

Every hand-off starts from the history

Activity, notes, tags, custom fields and deals stay on one record the whole team reads.

Fewer duplicates to untangle

Contacts are added, edited or imported from CSV with duplicate detection.

Managers see where work stands

The dashboard shows new contacts, open deal value and recent activity.

What your team does

- ✓ Add, edit or import contacts from CSV, with duplicate detection
- ✓ Open the contact before replying: activity, notes, tags and deals
- ✓ Review the dashboard: new contacts, open deal value, recent activity

The useful output

- → One record per customer, with its history, notes and deals
- → A dashboard view of where conversations and deals stand
- → A broadcast report: sent, delivered, read and answered, once WhatsApp is activated

iConnect CRM

Ref. 1

What it needs

- **A team workspace with roles**
  Owner, admin, agent or viewer for each teammate
- **For conversations: iConnect Inbox (Controlled rollout)**
  A WhatsApp channel activated on your own WhatsApp Business account
- **Website enquiry capture, if used**
  Set up for your deployment before enquiries arrive

What you gain by connecting it

1 → 2 iSales

— Demonstrated in testing

iSales (Controlled rollout) converts a lead on the contact into a deal that keeps the customer's history.

1 ← 4 iField

— Demonstrated in testing

iField (Controlled beta) is designed to put the visit outcome and next action on the customer timeline.

1 ⋯◂ 6 iConnect Inbox

····· Configured per deployment

With a WhatsApp channel activated, iConnect Inbox (Controlled rollout) links conversations to the contact.

Demonstrated in testing: shown working in test environments, before your own set-up · Configured per deployment: built, then set up and verified for your accounts

How your team uses it

Agent or salesperson
Opens the contact before replying
→ History, notes and open deals in one view

→

Admin
Imports contacts and resolves duplicates
→ One clean record per customer

→

Manager
Reviews the dashboard
→ Open deal value and recent activity

→

What your business gains
Every hand-off starts from one history your business keeps.

Next step

Book a tailored iConnect CRM demo for your team

We show it on demonstration data, shaped around your workflow, and agree the first scope together.

https://iconsultants.tech/iconnect/demo

Technical detail: iConnect Technical Evaluation Guide

Scan to request the demo