iConnect

Technical Evaluation Guide

What each offering does, the data it owns, what it needs and how its connections are evidenced.

For IT, operations and service leads evaluating iConnect with iConsultants.

How to read this guide

Each offering has one page. Connections carry one of three labels. A product page or this guide does not by itself establish a purchase option; scope, set-up and delivery milestones are agreed in your proposal.

Connection labels

— 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
– – Planned	illustrative; not implemented yet

Scope of statements

Statements describe the product as demonstrated on demonstration data and in test environments. Security and data separation are described only as far as current verification supports; nothing in this guide is a compliance or service-level commitment.

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Evaluate it with your team

Book a tailored demonstration and a technical session: we walk through your workflow, roles, channels and data with your team.

https://iconsultants.tech/iconnect/demo

iConnect CRM

Ref. 1

What it does

Keeps contacts, notes and activity on one shared customer record, with a dashboard, broadcasts, roles and an API.

Data it owns

- Contacts: tags, custom fields and notes
- Activity on the shared customer timeline
- Team members, roles and invitations
- Broadcasts and their delivery reports, once your WhatsApp channel is activated

Required components

- A team workspace with account roles
- For conversations: iConnect Inbox (Controlled rollout) with an activated WhatsApp channel
- Website enquiry capture, if used, set up per deployment

Connections and evidence

Connection	Evidence
From Website enquiry: contact + enquiry source Capture is set up per deployment.	— Demonstrated in testing
To iSales: customer history + lead to deal	— Demonstrated in testing
From iConnect Inbox: conversation linked to the contact	····· Configured per deployment
From iField: visit outcome + next action	— Demonstrated in testing
To iSupport AI: customer history informs the draft Drafts do not read the customer record today.	– – Planned
From iGrowth: reviewed prospect	— Demonstrated in testing
To iEngage: eligible, consenting audience	— Demonstrated in testing

Deployment and configuration

- Browser web app; there is no native mobile app.
- Arabic interface: no professional language review yet.
- WhatsApp: activation and verification pending on your own WhatsApp Business account.

Security and data separation

- Four account roles; teammates join by invitation.
- Duplicate detection keeps one record per customer.
- A REST API and webhooks exist for developers.

Open items

- Website chat is demonstrated in testing, not yet released; company email is in development.
- Flows is labelled beta in the product and is still being developed.
- Reporting is the dashboard and module summary cards; there is no separate reporting module.

Leads & Sales (iSales)

Ref. 2

What it does

Keeps each lead on the shared customer record with its source, lets a salesperson convert a reviewed lead into a deal in one step, and runs deals on pipelines with your own stages.

Data it owns

- Deals: owner, value, currency including Gulf currencies, expected close date and stage
- Pipelines and their stages
- Lead source: form, campaign, source and landing page, once capture is set up
- Links from each deal to its contact and conversation

Required components

- ✓ Customer records in iConnect CRM (Controlled rollout); every lead is a contact
- ✓ Account roles for salespeople and managers: owner, admin, agent and viewer
- ✓ Website enquiry capture, if used, set up per deployment
- ✓ For deal-linked conversations: iConnect Inbox (Controlled rollout) with an activated WhatsApp channel

Connections and evidence

Connection	Evidence
From CRM: customer history + lead to deal	— Demonstrated in testing
From iConnect Inbox: conversation handed to a sales owner Today the conversation and the deal share the same contact only.	– – Planned
From iField: visit outcome opens or moves a deal Visits do not open or move deals.	– – Planned
From iEngage: sales-accepted hand-off	— Demonstrated in testing
From Growth Engine: hand-off to a salesperson	— Demonstrated in testing

Deployment and configuration

- A web app that runs in the browser; there is no native mobile app.
- Website enquiry capture is set up per deployment and is not running until that set-up is done.
- Pipelines use stages you define.

Security and data separation

- Deals are worked within the iConnect account roles: owner, admin, agent and viewer.
- A person qualifies every lead and decides the next step; the software does not qualify leads.

Open items

- Lead stages and follow-up dates are planned.
- Lead scoring, forecasting and sales quotas are not part of iSales.
- Field visits do not open or move deals; that hand-off is planned.

iEngage

Ref. 3

What it does

Designed to organise consenting audiences and follow-up journeys from the customer record, record engagement signals, and hand sales a proposed hand-off with the engagement context.

Data it owns

- Audiences built from customer records by tag, field and response (planned)
- Campaigns and follow-up journeys, with campaign and source on each lead (planned)
- Engagement signals: deliveries, opens, clicks and replies (planned)
- Proposed hand-offs and the salesperson's accept or decline decision (planned)

Required components

- Customer and audience records with consent in iConnect CRM (Controlled rollout)
- A sending account for email journeys, set up per deployment
- For the hand-off: Leads & Sales (iSales) (Controlled rollout)

Connections and evidence

Connection	Evidence
From CRM: eligible, consenting audience	— Demonstrated in testing
To iSales: sales-accepted hand-off	— Demonstrated in testing
From iGrowth: research signals to engagement	– – Planned
To CRM: engagement on the customer timeline	– – Planned
From Growth Engine: coordinated enrolment step	— Demonstrated in testing

Deployment and configuration

- Roadmap: campaigns, journeys, engagement scoring and the sales hand-off are planned, not available today.
- Planned to run inside iConnect on the customer records, consent and roles of iConnect CRM (Controlled rollout).

Security and data separation

- An enquiry is never treated as marketing consent; messages are designed to go only to contacts whose consent is recorded.
- Opt-outs are respected. Scores suggest; a salesperson decides.

Open items

- iEngage does not publish to social networks; social planning belongs to iGrowth (Roadmap).
- Showing engagement on the customer timeline is planned.

Field Sales (iField)

Ref. 4

What it does

Records customer visits: check-in and check-out with location, outcome, notes, next action, order requests and collections from the phone browser, with a manager view.

Data it owns

- Visit records: check-in and check-out time and location, outcome, notes, next action
- Order requests and collections, kept as follow-ups, not accounting entries
- Location corrections approved or rejected by a manager

Required components

- ✓ Customer records in iConnect CRM (Controlled rollout)
- ✓ A phone browser with location access; no app installation
- ✓ Field sales roles: admin, manager, supervisor and representative

Connections and evidence

Connection	Evidence
To CRM: visit outcome + next action Designed to write to the customer timeline the account owner reads.	— Demonstrated in testing
To Manager: completed-visit notice	— Demonstrated in testing
To iSales: visit outcome opens or moves a deal Visits do not open or move deals; the customer record is the link.	– – Planned
To iKPI: visit records for performance measures iKPI (Roadmap) is designed to use visit records; shown on demonstration data.	— Demonstrated in testing

Deployment and configuration

- Opened in the phone's browser; there is no native mobile app.
- Location is recorded at check-in and check-out, with overrides shown to the manager; accepted with simulated location, real-phone acceptance pending.
- Customer records and field sales roles are set up for your teams.

Security and data separation

- Four field sales roles, separate from account roles, decide who manages, supervises and visits.
- Location is recorded at check-in and check-out only, not between visits.

Open items

- Orders and collections are requests and follow-ups; iField is not an accounting or invoicing system.
- AI visit recaps are drafts a representative approves or rejects; not yet accepted in the controlled beta.
- A deal hand-off straight from the visit is planned.

AI Support (iSupport AI)

Ref. 5

What it does

Drafts replies inside iConnect Inbox (Controlled rollout) conversations from knowledge your company has approved, shows its sources and a confidence level, and hands the conversation to a person when it should not answer.

Data it owns

- Knowledge documents in collections: draft, approved or archived
- Draft replies with their sources and confidence level
- Handoff rules: on request, without approved knowledge, below the confidence threshold or on a repeated question
- Usage view: token consumption and budget limits on your own provider key

Required components

- iConnect Inbox (Controlled rollout): drafts appear in its conversations
- Approved knowledge, added as pasted text
- A WhatsApp channel activated with your own WhatsApp Business account
- Your own AI provider key; usage is on your account with the provider

Connections and evidence

Connection	Evidence
From Approved knowledge: approved answer sources Only knowledge your company marks as approved is used.	Configured per deployment
To iConnect Inbox: draft for a person to review Needs a channel, approved knowledge and your own AI provider key; a person approves every reply.	Configured per deployment
From CRM: customer history informs the draft Drafts use the conversation and approved knowledge only.	Planned
To iQuality: AI drafts included in quality review	Planned

Deployment and configuration

- Knowledge is added as pasted text and used only once it is marked as approved.
- WhatsApp is the only channel it drafts for: integration built, activation and verification pending.
- Handoff goes to a named person, then a team, then the unassigned queue; notifications appear inside iConnect.

Security and data separation

- The AI drafts; a person sends. Nothing reaches the customer until a team member approves it.
- Drafts use the conversation and approved knowledge only; they do not read customer history.

Open items

- AI drafts can be wrong; your team reads each one before sending it.
- Adding customer history to drafts is planned.

Shared Inbox (iConnect Inbox)

Ref. 6

What it does

Brings configured customer conversations into one team workspace with ownership, status, threads, notes, templates and quick replies, beside the customer record.

Data it owns

- Conversations and messages from configured channels
- Owner, status (open, pending or closed) and unread state per conversation
- Internal notes, templates, quick replies and tags
- An audit history of assignments and changes

Required components

- Customer records in iConnect CRM (Controlled rollout)
- An activated, verified channel: WhatsApp on your own WhatsApp Business account
- Team members with roles for viewing, owning and replying

Connections and evidence

Connection	Evidence
To CRM: conversation linked to the contact Matched by phone number, never by display name.	Configured per deployment
To iSales: conversation handed to a sales owner	Planned
From Website chat: conversation + owner Replies to website visitors are not yet released.	Demonstrated in testing
From WhatsApp: conversation + owner Uses your own WhatsApp Business account.	Configured per deployment
From iSupport AI: draft for a person to review A person approves every reply.	Configured per deployment
To iQuality: sampled conversation for review	Demonstrated in testing

Deployment and configuration

- Each channel is activated with your own business account and verified before use.
- Replies follow your staffed hours; roles and templates are set up with you.
- Browser web app; there is no native mobile app.

Security and data separation

- Access follows the account roles shared with iConnect CRM (Controlled rollout).
- Duplicate incoming messages are stored once; contacts are matched by phone number, never display name.
- An audit history records assignments and changes, so a handover can be traced.

Open items

- Website chat has been demonstrated in testing and is not yet released.
- Company email is in development; no other messaging channel is available.
- The Arabic interface has not yet had a professional language review.

iQuality

Ref. 7

What it does

Designed to review company-owned conversations against agreed criteria, link each finding to its messages, have a person confirm every assessment, and record coaching with a later review.

Data it owns

- Quality criteria by team, channel or conversation type (planned)
- Assessments linked to the conversation and messages behind them (planned)
- Coaching actions and later comparable reviews (planned)

Required components

- iConnect Inbox (Controlled rollout): the conversations it reviews
- Agreed quality criteria
- Named reviewers and coaches with separate roles
- A transparent workplace policy on how conversations are reviewed

Connections and evidence

Connection	Evidence
From iConnect Inbox: sampled conversation for review	— Demonstrated in testing
To iSight: protected team summary	— Demonstrated in testing
From iSupport AI: AI drafts included in quality review	– – Planned

Deployment and configuration

- Roadmap: iQuality is planned and not yet offered.
- Company-owned channels only; personal phones, personal messaging accounts and personal email are never monitored.

Security and data separation

- Designed with separate reviewer, coach and team-member roles; team summaries need their own permission.
- Team summaries are designed to suppress any group below an agreed minimum size, so results never show one person.

Open items

- A score supports a manager's judgement; it does not establish fault, and an automated assessment is not always correct.
- Response-time targets and alerts for overdue conversations are planned.
- Sharing quality results with iKPI (Roadmap) is a planned connection that is not built yet; it would be separately governed.

iFlow

Ref. 8

What it does

Designed to route each request through configured workflow steps to the named approver, flag overdue steps, record each decision and start the next responsible action.

Data it owns

- Workflow records: the request, each step, its approver and its decision (planned)
- The time spent waiting at each step (planned)

Required components

- Workflow templates agreed with your team: steps, approvers and due times
- Approvers set up with access in your iConnect workspace
- A source of requests: a person, or an event from another iConnect product where that connection exists

Connections and evidence

Connection	Evidence
To iKPI: workflow timings for measurement	– – Planned
From iKPI: approved improvement action	– – Planned
From iReview: recorded decision starts the next action	– – Planned

Deployment and configuration

- Roadmap: iFlow is planned and not yet offered.
- Workflows, approvers and due times are agreed with your team and configured for your deployment.

Security and data separation

- Designed so only the named approver for a step can decide it, within your company's own workspace.

Open items

- The Automations and Flows in iConnect CRM (Controlled rollout) are a different, existing feature, not iFlow.
- Reducing approval time is a goal to measure, not a promised result.

iReview

Ref. 9

What it does

Designed as a bilingual review space where clients comment on a specific content version and record a decision, with who made it and when.

Data it owns

- Content versions shared for review (planned)
- Comments attached to the version they refer to (planned)
- Decisions: approved, rejected or changes requested, with who made them and when (planned)

Required components

- Content versions your team shares for review
- Named reviewers on the client side
- Team members with access to share versions and follow decisions

Connections and evidence

Connection	Evidence
From Content version: content version for review	– – Planned
To iFlow: recorded decision starts the next action	– – Planned
From CRM: client context	– – Planned

Deployment and configuration

- Roadmap: iReview is planned and not part of the current iConnect release.
- There is no self-service sign-up.
- Designed for reviewers working in Arabic or English.

Security and data separation

- A recorded decision is a working record for your team and your client; it is not offered as legal evidence.

Open items

- Connections with iConnect CRM (Controlled rollout) and iFlow (Roadmap) are planned.
- Access requirements, including how your team and your client's reviewers sign in, are confirmed during scoping.

iSight

Ref. 10

What it does

Designed to gather permitted summaries from other iConnect products into one management view and highlight the exceptions that need a decision, with the source behind each figure.

Data it owns

- No primary records: designed to read permitted summaries from other products
- Exceptions with a named owner (planned)

Required components

- At least one source product, such as iConnect CRM (Controlled rollout)
- Agreed definitions for each reviewed figure
- Viewers with reporting permission

Connections and evidence

Connection	Evidence
From iQuality: protected team summary	— Demonstrated in testing
From iKPI: pinned performance summary	— Demonstrated in testing

Deployment and configuration

- Roadmap: iSight is planned and not yet offered.
- The main dashboard in iConnect CRM (Controlled rollout) and the manager view in iField (Controlled beta) are separate, existing views, not iSight.

Security and data separation

- Designed so only viewers with reporting permission see the management view.
- Protected summaries are designed never to show individuals in small groups.

Open items

- Visibility supports a decision; it does not by itself prove the root cause of a problem.
- Summaries from iGrowth (Roadmap) and iConnect Growth Engine (Roadmap) are not part of the current design.

What it does

Designed to measure recorded process events against agreed, versioned definitions, separating queue time from active time at each stage, and to turn findings into owned improvement actions.

Data it owns

- Versioned metric definitions and targets (planned)
- Journey views of orders, requests and tasks by stage (planned)
- Improvement actions with an owner, a due date and a measure (planned)

Required components

- Recorded events from validated event files or an approved API
- Processes configured with you: stages, owners and business calendar
- Metric definitions and targets approved by your managers
- For sector measures: configuration and suitable source data

Connections and evidence

Connection	Evidence
From iField: visit records for performance measures	— Demonstrated in testing
To iSight: pinned performance summary	— Demonstrated in testing
From iFlow: workflow timings for measurement	– – Planned
To iFlow: approved improvement action	– – Planned

Deployment and configuration

- Roadmap: parts of the design have been demonstrated in testing on demonstration data; nothing is released and no real client data has been used.
- A missing timestamp is designed to be flagged rather than counted as zero.

Security and data separation

- People measures are designed to be visible only to authorised roles.
- AI is designed to summarise evidence and suggest questions; it would not calculate measures, rank employees or make decisions.

Open items

- It does not forecast results or replace accounting, payroll or workflow systems.
- Waiting time alone does not show that a person is at fault.

iGrowth

Ref. 12

What it does

Designed to keep company research and agreed fit criteria in one place, explain each qualification, and hand reviewed prospects to the customer record with their research.

Data it owns

- Ideal-customer criteria (planned)
- Prospect briefs with matched criteria and supporting sources (planned)
- Qualifications with a proposed next action (planned)

Required components

- Ideal-customer criteria agreed by your commercial team
- Approved company files or licensed data providers that you authorise
- Customer records in iConnect CRM (Controlled rollout)

Connections and evidence

Connection	Evidence
To CRM: reviewed prospect	— Demonstrated in testing
To iEngage: research signals to engagement	– – Planned

Deployment and configuration

- Roadmap: a first version of the research and hand-off design has been demonstrated in testing on demonstration data; nothing is released.
- No data provider and no social account is connected yet.

Security and data separation

- A hand-off is designed to carry marketing consent switched off; research never establishes consent or a lawful basis for outreach.
- Qualification is designed to be rule-based and explainable; AI would not decide whether a company qualifies.

Open items

- Social planning, publishing and listening are planned scope, not built capability.
- A buying signal is not confirmed buying intent.

iSEO & Outreach

Ref. 13

What it does

Designed to track search visibility, manage publisher opportunities, draft outreach for a person's approval and verify placements, keeping publisher relationships on the customer record.

Data it owns

- Publisher opportunities and their status (planned)
- Outreach drafts and approval records (planned)
- Placements and their verification (planned)

Required components

- Customer records in iConnect CRM (Controlled rollout)
- Search-data providers that you authorise
- An email sending provider that you authorise

Connections and evidence

Connection	Evidence
To CRM: publisher contact linked to the CRM	— Demonstrated in testing

Deployment and configuration

- Roadmap: much of the design has been built and checked on demonstration data; it is switched off and unreleased.
- No search-data or email provider is connected yet.

Security and data separation

- Messages are designed to be sent only after a person approves them, through the provider you authorise.
- Publisher contacts are designed to be excluded from marketing audiences.

Open items

- It does not promise rankings, traffic, backlinks, enquiries or sales.
- Its link to the customer record has been checked without an end-to-end test.

iConnect Growth Engine

Ref. 14

What it does

Designed to coordinate the offerings in one agreed growth workflow, from research to engagement, opportunity and follow-up, with an owner and a status for every step. It owns no primary record.

Data it owns

- No primary record: each step's record stays with the product that owns it
- Workflow configuration and step status (planned)

Required components

- The offerings in your agreed workflow, each at its own status
- Customer records in iConnect CRM (Controlled rollout)
- Consent records and an email sending setup for the engagement steps
- Authorised people to start each hand-off

Connections and evidence

Connection	Evidence
To iEngage: coordinated enrolment step	— Demonstrated in testing
To iSales: hand-off to a salesperson	— Demonstrated in testing

Deployment and configuration

- Roadmap: the coordination design has been demonstrated in testing on demonstration data; some steps are not built yet, and nothing is released.
- A step can only be used once the product that owns it is available to you.

Security and data separation

- Hand-offs are designed to be started by an authorised person and recorded once; that safeguard has not been released.

Open items

- It is not another prospect database or customer record: it coordinates the products that own those records.
- It does not promise revenue, lead volume or return.