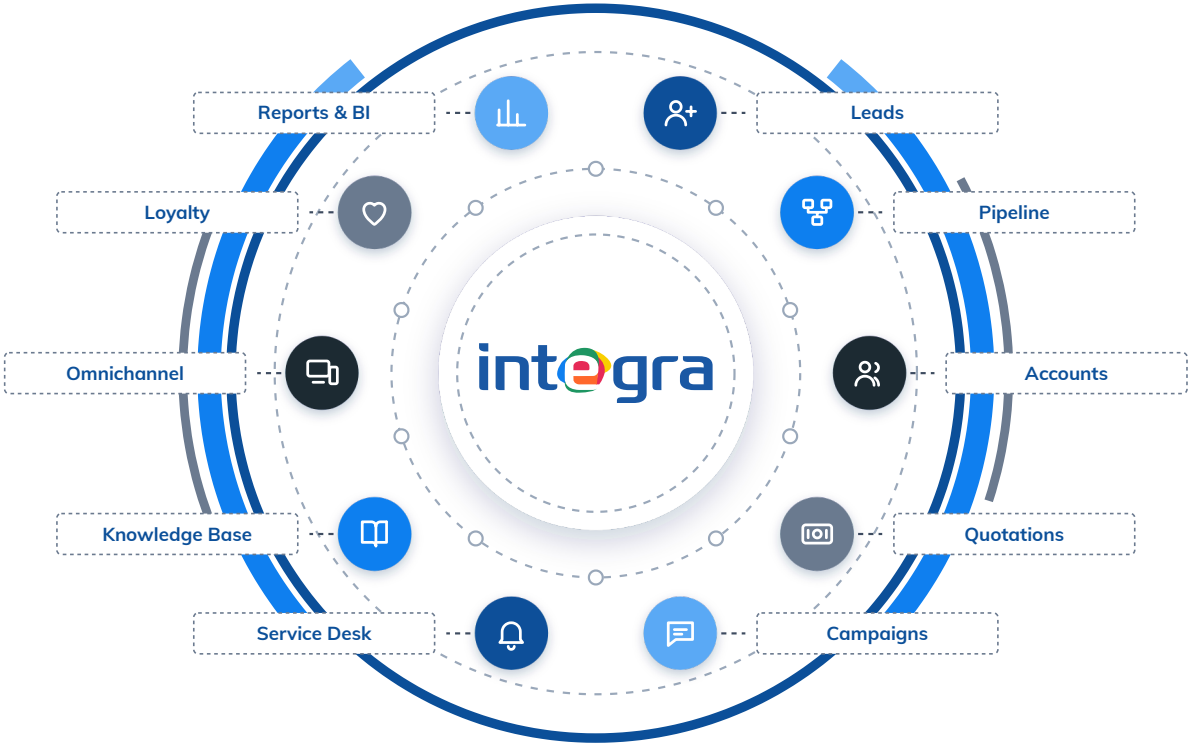
INTEGRA CUSTOMER SUITE



AI-Powered

Every customer, one connected record

Leads, deals, campaigns, service, conversations and loyalty, connected in one system.

Built for sales, marketing and service teams of every size, in any country, on any device.

- Sales Teams
- Marketing Teams
- Service Desks
- Channel Partners

01

Why Integra

Many businesses keep leads in spreadsheets, deals in inboxes and complaints in a separate helpdesk. The Customer Suite puts sales, marketing and service on one customer record, so every team sees the full story.

From scattered tools to one customer record

Without Integra	With Integra Customer Suite
– Leads lost in inboxes and spreadsheets	✓ Every lead captured, scored and assigned
– Deals forecast from memory	✓ A live pipeline with forecasts by team
– Campaigns sent to everyone the same way	✓ Segmented campaigns and automated journeys
– Complaints tracked in a separate helpdesk	✓ Cases on the same customer record as sales
– Promised response times missed	✓ SLAs with escalations before they breach
– Customers repeat their story on every channel	✓ Email, chat, WhatsApp and calls in one inbox
– No idea which customers are about to leave	✓ Feedback, health scores and churn alerts

02

The solution

The Customer Suite brings CRM, marketing and service together on the Integra platform. Orders, invoices, documents and messaging come from the shared core, so customer data is entered once.

Your customer at the centre of every team

03

Lead to loyal customer

From the first enquiry to renewal and referral, every step is recorded once and shared with sales, marketing and service.

One journey, one record

Capture

Leads from forms, chats, calls and campaigns land in one place.

Qualify

Scoring and rules send the best leads to the right person.

Win

Pipeline, activities and approved quotes close more deals.

Onboard

Orders, invoices and onboarding plans start the relationship well.

Support

Cases tracked against SLAs on every channel.

Self-serve

A portal and knowledge base answer common questions.

Reward

Loyalty points, surveys and offers keep customers close.

Grow

Renewals, upsells and referrals tracked by account.

04

Service & Satisfaction

Resolve requests faster on every channel, and see who is happy and who is at risk.

Service that customers remember

One shared inbox

Email, chat, WhatsApp and social messages handled in one place.

SLAs that hold

Response and resolution targets with escalations before breach.

Answers on hand

A knowledge base for agents and customers, suggested on each ticket.

Satisfaction measured

CSAT and NPS after every interaction, with follow-up on low scores.

05

Everything customer teams run on

34 modules in 10 areas. Switch on what you need today and add the rest as you grow.

Leads & Pipeline

More leads, faster follow-up.

- Lead Capture
- Lead Scoring
- Pipeline
- Activities
- Calendar
- Email Tracking

Accounts & Selling

Every account, every quote.

- Accounts & Contacts
- Customer 360
- Price Books
- Quotations
- Territories
- Forecasting

Marketing

The right message to the right segment.

- Segments
- Email Campaigns
- SMS & WhatsApp
- Journeys
- A/B Testing
- Attribution

Customer Service

Every request resolved on time.

- Cases & Tickets
- SLAs
- Escalations
- Knowledge Base
- Self-Service Portal
- Field Service

Omnichannel

Every conversation in one place.

- Shared Inbox
- Live Chat
- Chatbots
- WhatsApp
- Contact Centre
- Call Recording

Feedback & Loyalty

Customers who stay and refer.

- CSAT & NPS
- Loyalty Points
- Rewards
- Referrals
- Health Scores
- Churn Alerts

Partners & Channels

Sell through every partner.

- Partner Records
- Deal Registration
- Partner Portal
- Lead Distribution
- Partner Targets
- Commissions

Intelligence & Platform

Numbers, AI and apps for every team.

- Dashboards
- Workflow Rules
- Mobile CRM
- Notifications
- Integrations
- Integra AI

06

Connected customers

Email, phones, chat, WhatsApp and your other systems connect to the same customer record.

Connected to every customer touchpoint

Email and calendar

Two-way email and calendar sync, with every message logged on the record.

Telephony

Click-to-call, call logging and recording from cloud telephony.

Website and chat

Web forms and chat widgets feed leads and tickets straight in.

WhatsApp and SMS

Two-way WhatsApp and SMS conversations in the shared inbox.

Commerce and finance

Quotes become orders and invoices in Integra Commerce and Finance.

Mobile apps

Pipeline, contacts and tickets on the phone, even offline.

Secure role-based access

Each team sees only the records and fields its role allows.

APIs & webhooks

Open APIs connect marketing tools, websites and other systems.

07

Integra AI

AI built into every module. It suggests, people decide.

Smarter every day, with people in control

Deal Predictions

Likelihood to win and next best action for every open deal.

Reply Suggestions

Draft replies for agents from the knowledge base and history.

Ticket Classification

Incoming tickets sorted by topic, priority and sentiment.

AI Assistant

Ask about pipeline, accounts or service in plain language.

AI suggests, people decide. Every AI action is approved and logged.

Your path to connected customers

Let's build your connected customer teams

Tell us how your teams work and we will show you the Customer Suite running your sales and service.

Present in India, Sri Lanka, Singapore and Saudi Arabia

INDIA

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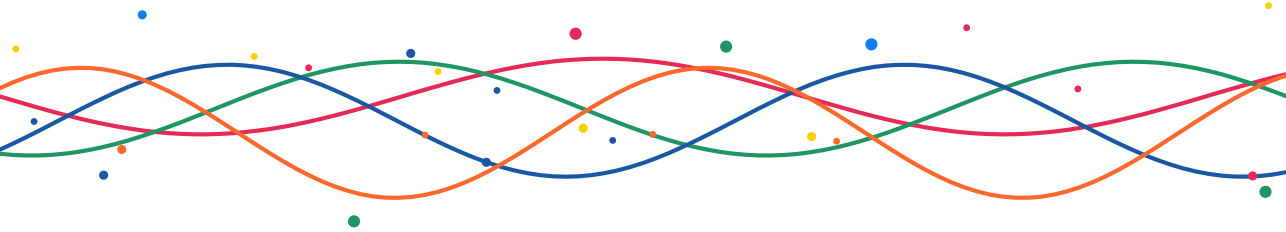

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