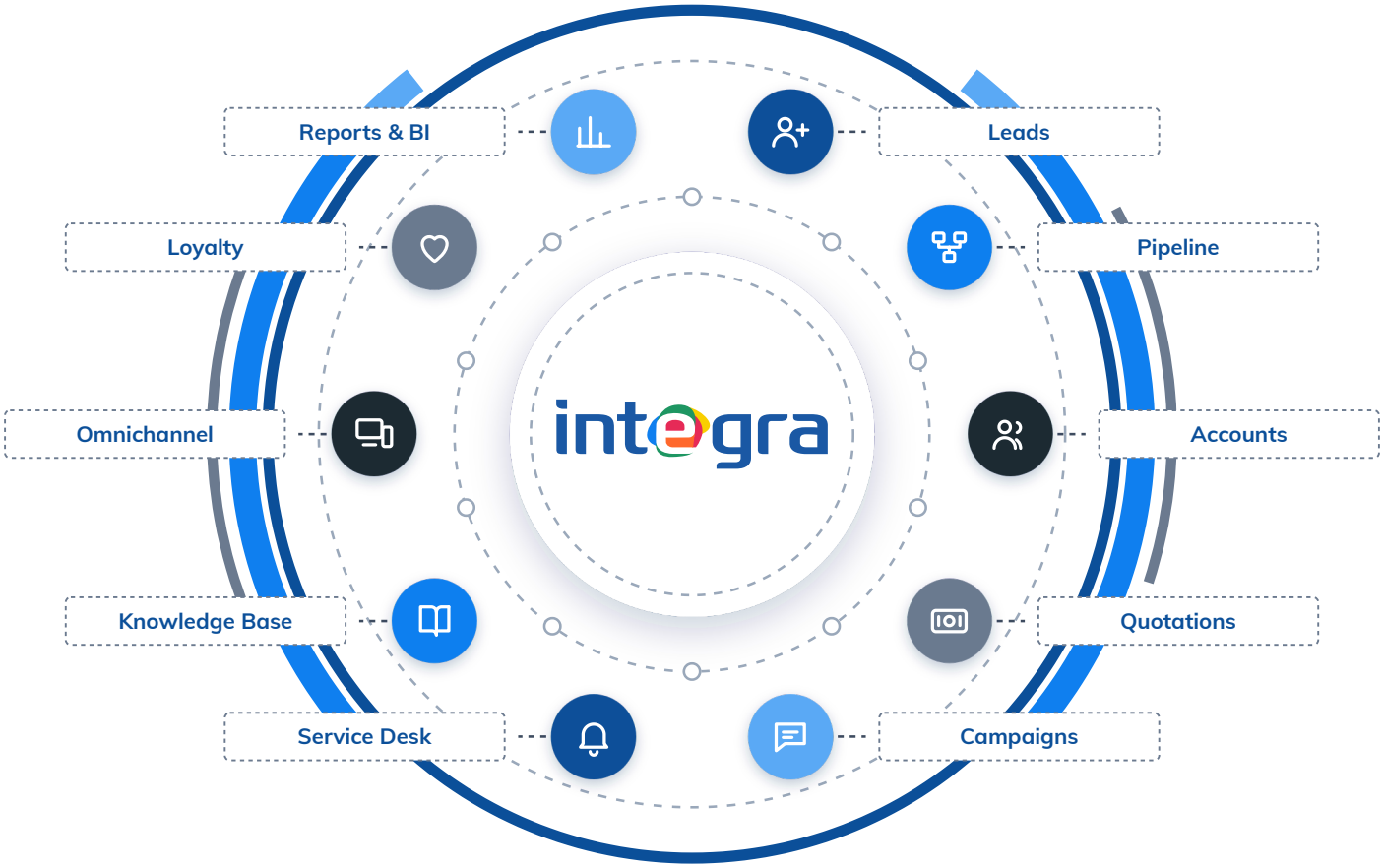
INTEGRA CUSTOMER SUITE



AI-Powered

Complete Features

Every benefit and every feature of Integra Customer Suite, area by area.

BENEFITS

What your customer teams gain

One connected platform for sales, marketing and service. Here is what changes for sales reps, marketers, service agents, managers and your customers.

No lead left behind

Every lead captured, scored and assigned within minutes.

A pipeline you can trust

Live deal stages and forecasts by team and period.

Faster quotes

Approved quotes from price books, accepted online.

Smarter campaigns

Segments, journeys and attribution show what really works.

Service on time

Cases tracked against SLAs, with escalations before breach.

Every channel in one place

Email, chat, WhatsApp and calls in one shared inbox.

Customers who self-serve

A portal and knowledge base answer common questions.

Customers who stay

Feedback, loyalty and health scores reduce churn.

AI that saves time

Deal predictions, reply drafts and ticket sorting. People decide.

Grows with you

Add teams, partners and channels on the same platform.

CONTENTS

34 modules in 10 areas, one platform

Every module runs on one platform. Modules marked + come in optional packs.

Leads & Pipeline

- Lead Capture
- Lead Scoring & Qualification
- Sales Pipeline
- Activities & Calendar

Accounts & Contacts

- Accounts & Contacts
- Customer 360
- Account Management

Quotes & Selling

- Products & Price Books
- Quotations & Proposals
- Territories & Targets
- Sales Forecasting

Marketing & Journeys

- Email & SMS Campaigns
- Customer Journeys
- Lead Attribution & ROI

Customer Service

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

Omnichannel & Contact Centre

- Shared Inbox
- Live Chat & Chatbots
- Contact Centre+

Feedback & Loyalty

- Surveys & Feedback
- Loyalty & Rewards
- Customer Success

Partners & Channels

- Partner Management
- Partner Portal+

Communication Engine

- Notifications & Templates
- Preferences & Consent

Intelligence & Platform

- Reports & Dashboards
- Workflow & Automation
- Mobile CRM
- Integra AI
- Integrations & APIs

+ Optional pack (Contact Centre, Field Service or Partner Portal).

Leads & Pipeline

Lead Capture

Leads from web forms, ads, calls and chats in one place.

- Web forms and landing pages
- Email and chat capture
- Duplicate detection
- Lead source tracking
- Auto assignment

Lead Scoring & Qualification

The best leads reach the right person first.

- Scoring rules
- Qualification stages
- Round-robin and territory rules
- Nurture lists

Sales Pipeline

Every deal by stage, value and expected close.

- Visual pipeline
- Multiple pipelines
- Stage probability
- Win and loss reasons
- Deal reminders

Activities & Calendar

Calls, meetings and tasks that never slip.

- Tasks and follow-ups
- Meeting scheduling
- Call logging
- Email tracking
- Activity timeline

Accounts & Contacts

Accounts & Contacts

One record for every customer and stakeholder.

- Company and contact records
- Account hierarchies
- Relationship maps
- Custom fields
- Complete history

Customer 360

Orders, invoices, cases and messages on one screen.

- Sales and service history
- Open invoices and dues
- Cases and feedback
- Communication log

Account Management

Retention, renewals and growth for key accounts.

- Account plans
- Renewal tracking
- Health scores
- Upsell opportunities

Quotes & Selling

Products & Price Books

Products, bundles and price books for every market.

- Product catalogue
- Price books
- Bundles
- Currencies

Territories & Targets

Territories, teams, quotas and performance.

- Territory rules
- Team hierarchies
- Targets and quotas
- Leaderboards

Quotations & Proposals

Professional quotes in minutes, approved and tracked.

- Quote templates
- Discount approvals
- E-sign acceptance
- Quote to order

Sales Forecasting

Forecasts you can trust, by team and period.

- Forecast by stage and owner
- Committed and best case
- Forecast versus target
- Trend analysis

Marketing & Journeys

Email & SMS Campaigns

Campaigns to the right segment, measured end to end.

- Segments and lists
- Email and SMS campaigns
- WhatsApp broadcasts
- Campaign reports

Lead Attribution & ROI

Know which campaigns bring revenue.

- Source attribution
- Campaign cost tracking
- Return on spend
- Channel comparison

Customer Journeys

Automated journeys triggered by what customers do.

- Journey builder
- Event triggers
- Drip sequences
- A/B testing

Customer Service

Cases & Tickets

Every request tracked from first contact to resolution.

- Email, web and chat tickets
- Priorities and categories
- Assignment rules
- Internal notes
- Resolution tracking

SLAs & Escalations

Response and resolution times kept, with escalations.

- SLA policies
- Business hours
- Escalation rules
- Breach alerts

Knowledge Base

Answers for agents and customers in one library.

- Articles and FAQs
- Search
- Article approval
- Suggested articles on tickets

Self-Service Portal

Customers raise requests and find answers themselves.

- Customer login
- Ticket status
- Knowledge base access
- Community forums

Field Service FIELD SERVICE PACK

Technicians scheduled, dispatched and reporting from site.

- Work orders
- Scheduling and dispatch
- Technician mobile app
- Parts used
- Customer sign-off

Omnichannel & Contact Centre

Shared Inbox

Email, chat, WhatsApp and social in one inbox.

- Email and web chat
- WhatsApp and social messages
- Canned replies
- Collision detection

Live Chat & Chatbots

Chat on your website, with bots for common questions.

- Website chat widget
- Chatbot flows
- Hand-off to agents
- Chat transcripts

Contact Centre CONTACT CENTRE PACK

Calls and queues with full customer context.

- Cloud telephony
- IVR and call queues
- Click-to-call
- Call recording
- Agent dashboards

Feedback & Loyalty

Surveys & Feedback

Customer satisfaction measured after every interaction.

- CSAT and NPS surveys
- Post-ticket surveys
- Feedback dashboards
- Follow-up on low scores

Customer Success

Onboarding and adoption for long-term customers.

- Onboarding plans
- Adoption tracking
- Health scores
- Churn alerts

Loyalty & Rewards

Points and rewards that keep customers coming back.

- Points and tiers
- Rewards catalogue
- Referral programmes
- Loyalty reports

Partners & Channels

Partner Management

Resellers and partners with their deals and targets.

- Partner records
- Deal registration
- Partner targets
- Commission tracking

Partner Portal PARTNER PORTAL PACK

A portal where partners register deals and get leads.

- Partner login
- Lead distribution
- Deal registration
- Marketing materials

Communication Engine

Notifications & Templates

Every message from one engine with one set of templates.

- Email, SMS, WhatsApp and push
- Template library
- Personalisation
- Delivery tracking

Preferences & Consent

Customers choose how they hear from you.

- Channel preferences
- Opt-in and opt-out
- Do-not-disturb rules
- Consent records

Intelligence & Platform

Reports & Dashboards

Pipeline, service and campaign numbers at a glance.

- Sales dashboards
- Service dashboards
- Custom report builder
- Scheduled reports

Workflow & Automation

Rules that move work forward without manual effort.

- Workflow rules
- Approval processes
- Field updates and alerts
- Blueprint processes

Mobile CRM

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

- Mobile app
- Offline access
- Check-in with location
- Business card scanner

Integra AI

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

- Deal win predictions
- Reply suggestions for agents
- Ticket classification
- Questions in plain language
- Every AI action approved and logged

Integrations & APIs

Email, calendar, telephony and other systems connected.

- Email and calendar sync
- Telephony connectors
- Integra Finance and Commerce
- Open APIs and webhooks

integra

integraone.app

Any industry. Any country. Any device.

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