THE CODE SMITH

Business Suite

Leads, stores, stock, incentives and calls: one sign-in, apps that work together.

WHO IT'S FOR Growing companies that want sales, shops, stock, commissions and calls in apps that talk to each other.

5 apps on one sign-in

4 access levels per module, per person

6 outside CRMs through the hub, plus any CRM by webhook

THE APPS

Lead CRM
Leads, deals, quotes, tasks, email, WhatsApp and calendar sync.

Store CRM
One customer list from every till; groups, campaigns, texts, rewards.

Inventory & Till
Stock per location, buying, sales orders and an offline till.

Sales Incentives
Any commission or activity plan, statements, two-step approval.

Dialer
Browser calls, power dialler, recordings, AI notes, team reports.

Suite hub
One sign-in, people, roles and rights per module.

HOW THEY WORK TOGETHER

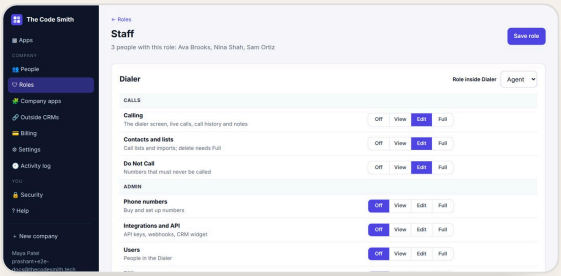
Into Sales Incentives: won deals from Lead CRM, Broker OS, Dealer CRM and outside CRMs; purchases from Store CRM; till sales and refunds from Inventory & Till.

Into Store CRM: till sales with a customer land in their purchase history; finished calls from the Dialer join the timeline.

Into Inventory & Till: sales from outside tills and online stores, synced into Store CRM, lower stock by SKU.

Into Lead CRM: quotes show live stock; calls, recordings and AI notes from the Dialer land on the contact.

THE SUITE HUB



A role in the hub: each module Off, View, Edit or Full

- One sign-in, with 2-step and recovery codes
- Sign in with Google can be switched on
- Your own roles; Off, View, Edit or Full per module
- Activity log, sessions, one billing page

Works with

Outside systems by app. "Being set up" = switched on as soon as the vendor approves our app.

Tills and online stores	STORE CRM	WooCommerce and Epos Now; Square, Shopify, Lightspeed, Clover, Zettle, SumUp, BigCommerce and Wix BEING SET UP
Outside CRMs	HUB, SALES INCENTIVES	HubSpot, Salesforce, Zoho, Pipedrive, Dynamics 365, Freshsales, any CRM by webhook; Sales Incentives also: monday.com, LeadSquared, Bitrix24, Zendesk Sell
Marketing	STORE CRM	Klaviyo, Mailchimp, Google Ads Customer Match; Meta ad audiences BEING SET UP
Messages	LEAD CRM, STORE CRM	Your mailbox (SMTP/IMAP), SMS by Telnyx, Connect WhatsApp, Google Calendar sync
Calls	DIALER	Telnyx phone network; US and UK numbers; calls logged in HubSpot and Pipedrive
Accounting	INVENTORY & TILL	QuickBooks Online and Xero BEING SET UP
Developer tools	ALL APPS	REST APIs and signed webhooks (Lead CRM Pro, Store CRM, Inventory, Sales Incentives, Dialer), Zapier, Make, CSV/Excel

For UAE brokerages: Broker OS. Permit-checked listings, feeds to Property Finder, Bayut and dubizzle, leads, deals and commissions, on the same hub. uae-broker.thecodesmith.tech

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