SALES · ON ITS OWN OR IN THE BUSINESS SUITE

Lead CRM

Find, follow and win customers: leads, deals, quotes, tasks, email and WhatsApp in one place.

WHO IT'S FOR Sales teams that need every lead followed up, every deal visible and every quote sent on time.

$12
per user a month to start; Growth $24, Pro $39

14 days
free trial with every feature, no card

2
inboxes: My Email and My WhatsApp, with unread counts

WHAT IT DOES

—Win more deals

- **Leads** — from web forms, Google Ads and CSV or Excel files, with owner, status and score.
- **Deals pipeline** — drag-and-drop stages with values and close dates; products on a deal (Growth); other currencies.
- **Quotations** — branded quotes from your product list, with discounts, tax, approval, PDF and a payment link.

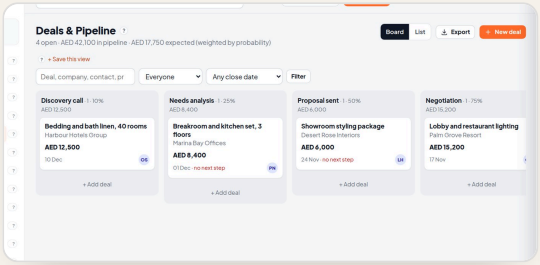
—Never miss a follow-up

- **Tasks and calendar** — reminders you time yourself, an alerts bell, a booking page and Google Calendar two-way sync.
- **My Email and My WhatsApp** — send from the record with templates; customer replies land in your own inboxes, matched to the lead.
- **Automation and bulk email** — rules for new leads and stage changes; bulk email and follow-up sequences (Pro).

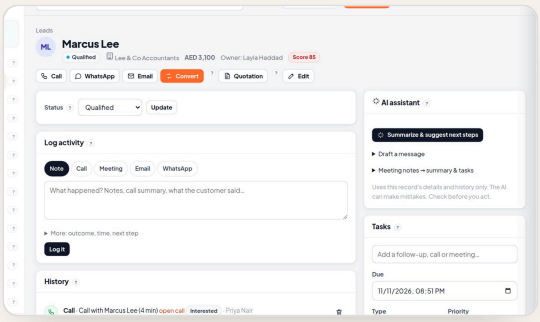
—See everything

- **Contacts and companies** — emails, calls, notes, files, deals and quotes on one page.
- **Reports and targets** — pipeline, won/lost, activity and source reports; sales targets per person and team (Pro).
- **AI assistant and tickets** — summaries and email drafts; customer issues with an owner (Pro).
- **Quick to start** — sign up with Google, pick a ready-made set-up, or try sample data.

INSIDE THE APP



Deals & Pipeline: drag deals between stages



A lead with its history, AI assistant, Call, WhatsApp and Email

Works with

Only connections that exist in the app today; "being set up" ones are switched on as soon as they are approved.

SUITE APPS

- **Dialer** — one-click connect; calls, recordings and AI notes come back
- **Sales Incentives** — won deals become sales for the deal owner
- **Inventory & Till** — quotes show live stock by SKU
- **Suite hub** — one sign-in and rights per module

OUTSIDE SYSTEMS

- **Your website and Google Ads** — form page, HTML form, one-line script; Google Ads lead forms
- **Your mailbox** — send from your own address; replies logged
- **WhatsApp** — connect your WhatsApp Business number
- **Google Calendar** — two-way sync of tasks and meetings

DEVELOPER AND DATA TOOLS

- **REST API and webhooks** — leads, contacts, deals, tasks; Zapier and Make (Pro)
- **CSV and Excel import** — leads, contacts and companies
- **Exports** — CSV of any list, full data export as a ZIP

Start your 14-day free trial at lead-crm.thecodesmith.tech

Every feature open during the trial. Start with this app; add the others any time.

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