



AI-INTEGRATED SALES, MARKETING & SERVICE PLATFORM

Integra CRM

CAPTURE • CONVERT • AUTOMATE • SERVE

One revenue platform for the whole customer journey — leads, pipeline, quotes, outreach, campaigns, helpdesk and analytics — with automations that actually run, numbers you can trust, and an AI layer powered by Anthropic Claude that works inside your own data, under your own roles.



One Platform

SALES • MARKETING • SERVICE •
ANALYTICS — ONE LOGIN, ONE
CUSTOMER RECORD

AI-Integrated

CLAUDE ASSISTANT • EMAIL
DRAFTING • DEAL RISK • CALL
ANALYSIS • COACHING

Open Platform

REST API • HMAC WEBHOOKS •
API KEYS • CLOUD OR ON-
PREMISE

Integra IT Solutions FZE LLC

Integra IT Solutions — formerly Edocs Solutions & Computer Consultants — has spent two decades building ERP, WMS, EDMS, CRM and BPM platforms for organisations that live and die by the clock.

Headquartered in Sharjah, UAE, our systems run inside top-tier courier, logistics and trading enterprises across the GCC, India, Africa and Southeast Asia. We build purpose-built platforms — not generic software bent out of shape — and we own the operational burden so our customers don't have to.

Integra CRM is the revenue front-end of the Integra platform suite. It runs standalone, or connected to Integra Finance, Integra Ontrack ERP, Integra WMS and third-party systems through its open API and signed webhooks.

Company at a glance

ORIGIN

Sharjah Publishing City Free Zone, UAE

EXPERIENCE

20+ years • 100+ global clients

REACH

Live deployments across GCC, India, Africa & Southeast Asia

PRODUCT LINES

Courier ERP • Cargo & Logistics •
Warehouse WMS • Integra Finance • Integra CRM • Integra AI • EDMS

DELIVERY

Cloud SaaS or on-premise • UAE data residency • dedicated instance per customer • 24/7 support

THE PRODUCT

What is Integra CRM?

A complete Sales Force Automation and customer platform — lead capture through pipeline, quoting, outreach, campaigns, helpdesk and executive analytics — built around how revenue teams actually work: shared records, enforced ownership, automations that fire on real events, and reports that say "no data" instead of inventing it.



Sales Core

34-field Lead object with scoring and one-click conversion to Account + Contact + Deal; kanban pipeline with stage history, forecast categories, products on deals, quotas and territories.



Marketing & Automation

Sequences that send, call and task on schedule; campaigns with real open / click / unsubscribe tracking; workflows with condition logic, run logs and signed webhooks — all executed by a dedicated worker.



Service Desk

Tickets with SLA policies and breach sweeps, assignee routing, canned responses, internal notes, automatic CSAT surveys on resolve, and a knowledge base with categories and feedback.

25+

WORKSPACES ACROSS
8 MODULES

220+

REST API
ENDPOINTS

33

ANALYTICS VIEWS
18 CHARTS • 15
REPORTS

13

DOMAIN EVENTS FOR
WORKFLOWS &
WEBHOOKS

Benefits at a Glance



One Customer Record

Lead, contact, account, deal, quote, ticket and every call or email on one timeline. No more "which system has the latest?"



Ownership Enforced

Reps see their records, managers their teams, viewers never write — enforced server-side on every endpoint.



AI That Shows Its Work

Claude-powered assistant, drafting and analysis — every answer labelled by engine, bounded by permissions, logged per feature.



Automations That Run

Workflows, sequences and campaigns execute on real events through a reliable outbox and worker — every run logged.



Numbers You Can Trust

33 analytics views from live data only. Where there is no data, the chart says so. Insights are computed, never canned.



Open by Design

REST API with API keys, HMAC-signed webhooks on 13 events, CSV import / export, native fit with Integra Finance and Ontrack ERP.

Modules



Major Features

- ✓ Browser-based — nothing to install
- ✓ 34-field Lead object, scoring, conversion with duplicate detection
- ✓ Kanban pipeline with automatic stage history
- ✓ Forecast categories, probability override, products on deals
- ✓ Quotas by rep, territories
- ✓ Quotes with public accept / decline page and deal sync
- ✓ Sequences — email, call, task, wait, LinkedIn
- ✓ Campaigns with tracked opens, clicks, unsubscribes
- ✓ Workflows with conditions, 7 operators, run logs
- ✓ Outbox + worker for guaranteed execution
- ✓ HMAC-signed webhooks with delivery log
- ✓ Tickets with SLA sweeps, assignee, canned responses
- ✓ Automatic CSAT survey on resolve
- ✓ Knowledge base with publishing and feedback
- ✓ Activities list + month calendar
- ✓ 38K command palette with live search
- ✓ Custom fields and editable picklists
- ✓ Claude AI assistant, drafting, deal risk, call analysis
- ✓ 18 charts + 15 reports, computed insights
- ✓ Four roles with server-enforced ownership
- ✓ Audit log on every change
- ✓ REST API, API keys, CSV import / export
- ✓ Migrations, 47 automated tests, cloud or on-premise

Leads, Pipeline & Deal Engine

A first-class **Lead → Account + Contact + Deal** model — the way Salesforce does it, without the Salesforce bill. Every conversion deduplicates, every stage move is recorded, every rep's number comes from a real quota.

Lead Object

- ✓ **34 fields** — salutation to compliance flags: company, title, industry, revenue band, employees, address block, source, status, rating, score
- ✓ Enterprise Leads workspace: stat strip, filters, score bars, slide-in detail with activities, attachments and comments
- ✓ **Convert** creates or links the Account (by company) and Contact (by email), optionally opens a Deal; the lead locks read-only after conversion
- ✓ CSV import with header mapping and bad-row reporting; one-click export
- ✓ Rule-based scoring (demographic / behavioural rules, positive or negative points) with per-lead breakdown

Lead Lifecycle



Assignment, status changes and conversions emit domain events — so workflows, notifications and webhooks fire the moment they happen, not at the next batch.

Deal Engine

Capability	What it does
Kanban pipeline	Drag-and-drop stages with counts and summed value; list view alongside
Stage history	Every transition auto-recorded — true velocity and ageing data
Forecast category	Pipeline · Best case · Commit · Closed; per-deal probability override
Products on deals	Catalogue line items with optional deal-value sync
Next step	Explicit next action on every open deal
Quotas	Per-rep quotas feed the leaderboard and attainment bars
Territories	Named territories with members and performance reports
Win / loss	Reason capture; win-rate and loss-reason analytics
Deal risk	Scored on inactivity, overdue close and age — AI narrative on demand

Activities & Calendar

Calls, emails, meetings, tasks and notes on any record. Pending / completed list plus a month calendar with overdue highlighting and day-click quick-create.

Custom Fields & Picklists

Admin-defined fields (text, number, date, select, checkbox) on leads, contacts, accounts and deals. Eleven system picklists editable in Master Data.

Command Palette

⌘K / Ctrl+K anywhere: jump to any workspace or search live across leads, contacts, accounts, deals and tickets — scoped to the user's permissions.

Quotes, Sequences & Campaigns

The three places where revenue leaks — unsent quotes, forgotten follow-ups and campaigns nobody can measure. In Integra CRM each one is a closed loop with a timestamp.

Quotes & CPQ

- ✓ Line items from the product catalogue with quantity, unit price and per-line discount; header discount and tax; **totals recomputed server-side** on every save
- ✓ Unique sequence-backed numbering — no collisions, no gaps
- ✓ **Email to customer** with a tokenised, login-free **public accept / decline page** (printable)
- ✓ Acceptance syncs the deal value, notifies the owner and locks the quote
- ✓ Public link copyable even before SMTP is configured; draft → sent → accepted / rejected / expired badges

Sequence Step Types



Enrol contacts manually or from a workflow action. Enrolment view shows step progress with pause / resume / stop; duplicate active enrolments are blocked.

Campaigns

- ✓ Audience by contact status; batched delivery with live "Sending..." progress
- ✓ **Real metrics** — tracking pixel for opens, click-redirects, public unsubscribe page that sets the contact's opt-out
- ✓ Every send logged per recipient with status; SMTP unconfigured → status *blocked*, never "sent"

Account-Based Marketing

Target-account list with Tier 1 / 2 / 3 management, live engagement score from activities and deals, per-account insights and recommendations, and ICP profiles with criteria lists.

What this means for you

- ✓ Quotes get answered on the customer's phone, not lost in an inbox
- ✓ The deal value updates itself the moment a quote is accepted
- ✓ Follow-ups happen on day 3 and day 7 whether the rep remembers or not
- ✓ Campaign open and click rates are measured, not estimated
- ✓ Unsubscribes are honoured automatically — compliance by default
- ✓ Nothing is ever marked "sent" that did not leave the server

EMAILS THE PLATFORM SENDS

Quote to customer

Sequence steps

Campaign sends

CSAT survey

Workflow email action

TRACKED PER MESSAGE

Sent

Opened

Clicked

Unsubscribed

Blocked

Workflows, Webhooks & the Service Desk

Every change in the CRM writes a domain event in the same transaction. A dedicated worker consumes those events — reliably, with retries and dead-lettering — and turns them into tasks, emails, stage moves, notifications and webhook calls.

Workflow Engine

Five triggers — contact created, contact status changed, deal created, deal stage changed, activity completed — with AND-conditions across seven operators. Actions: create task, update contact status, update deal stage, enrol in sequence, notify, send email. Each run is logged with its condition results.

Outbox & Worker

Transactional outbox plus a jobs queue (FOR UPDATE SKIP LOCKED) mean an event is never lost and never processed twice. Scheduled jobs power sequence steps, campaign batches and SLA sweeps.

Outbound Webhooks

Admin-managed subscriptions on 13 events (or all). Payloads signed with HMAC-SHA256 in X-Integra-Signature; one-time secrets, per-delivery log with response codes, and test-fire from the UI.

Notifications

Produced by the system — assignments, deal won / lost, urgent tickets, help requests, SLA warnings and breaches — with unread counts and deep links. Comments on any record can be flagged as help requests for managers.

Tickets & SLA

- ✓ Unique numbering, priority-bordered cards, clickable stat strip filters
- ✓ SLA policies per priority — first-response and resolution hours — with progress bars and **worker-driven breach sweeps** that store breach state
- ✓ Threaded conversation with public reply vs internal note; Ctrl+Enter to send
- ✓ Assignee control and canned responses in the composer
- ✓ Status flow: open → in progress → waiting → resolved → closed
- ✓ Tags, channel, escalation flag and category for reporting

Knowledge Base & CSAT

- ✓ Category tree with article counts; search and published / draft filters
- ✓ Publish toggle, internal-only flag, view counter and helpful / not-helpful feedback
- ✓ **CSAT survey** emailed automatically on first resolve; 1–5 rating captured through a public link and shown as stars on the ticket
- ✓ Satisfaction and NPS reporting — honest nulls for months without responses
- ✓ Support-integration report ties tickets back to accounts and deals

Reliability

Events written atomically with the change; retries with back-off; dead-letter after repeated failure; nothing silently dropped.

Honesty Rule

No SMTP → status *blocked* with a clear error. Run counters and metrics reflect what actually happened — never a simulated success.

Visibility

Workflow runs panel, enrolment progress, campaign recipient status, webhook delivery log, email log — every automation leaves a trail you can read.

AI That Shows Its Work

Integra CRM embeds **Anthropic Claude** into the revenue workflow — grounded in your own records, bounded by the requesting user's permissions, and labelled so nobody mistakes a template for intelligence.



Integra Assistant

Chat over the CRM with real tool use: search leads, contacts and deals; open a deal's full detail; summarise the user's pipeline by stage; create follow-up tasks (with confirmation). The UI shows which tools each answer used.



Generative Drafting

Email drafts from live record context by type and tone; deal summaries with recommended next steps; coaching reports synthesised from a rep's call history. Copy, regenerate, send.



Revenue Intelligence

Forecast scorecards (pipeline, weighted, won MTD, at-risk), per-deal risk score with factors and recommended action, and an AI narrative explaining the risk in plain language on demand.



Conversation Intelligence

Paste a call transcript: summary, sentiment with score, topics, action items, coaching notes and talk-ratio estimate. Keyword heuristics remain as the no-key fallback — and are labelled as such.

How AI is governed

Your key, your instance

Set ANTHROPIC_API_KEY in your deployment. Your records never train anyone's model.

Bounded by RBAC

Assistant tools run as the requesting user — a rep's assistant sees only the rep's records.

Labelled by engine

Every response carries engine: ai | template | heuristic, surfaced as a badge in the UI.

Logged per feature

Token usage recorded in ai_usage by feature and user — cost is visible, not a surprise.

6

ASSISTANT TOOLS
OVER THE CRM

7

AI-POWERED
FEATURES

100%

ANSWERS LABELLED
BY ENGINE

0

FEATURES THAT FAKE
AI WITHOUT A KEY

Without an API key, nothing pretends.

Every AI surface degrades to a clearly-labelled non-AI mode — templates, metrics or keyword heuristics — and the Integrations hub shows the AI connection status honestly. Switch the key on and the same screens light up with Claude; no retraining, no migration, no new licence tier.

Dashboards, Reports & the Platform Underneath

Thirty-three analytics views and a dashboard that loads eight live aggregates in parallel — on top of a hardened, migration-managed, tested platform you can run in our cloud or on your own servers.

Group	Views
Dashboard	Won this month with MoM trend · pipeline value · win rate YTD · avg deal size · new contacts · overdue activities · 6-month revenue · win / loss · pipeline by stage · top deals · rep leaderboard with attainment
Pipeline	Stage funnel · lead funnel · forecast waterfall · deal ageing · sales-cycle distribution
Revenue	Revenue vs quota · 12-month trend · ARR waterfall · revenue forecasting · quotation & orders
People	Rep radar · sales performance · field-force productivity · activity heatmap · territory performance
Marketing	Lead-source analysis · lead management · acquisition & retention cohorts
Customer	Account 360° · customer health matrix · NPS trend · satisfaction · support integration
Executive	RAG scorecard · executive dashboard · win / loss analysis · opportunity ageing

Honest analytics

No fallback datasets, no static prose. Around 50 insights are computed from the live payloads — biggest funnel drop, top loss reasons, quota months hit, trend vs 3-month average — so the narrative can never contradict the chart.

Audit & search

Every create, update and delete on core records logged with actor and changed fields. Live search across five objects from the command palette, scoped by role.

Security & Platform

ACCESS CONTROL

Admin · Manager · Sales Rep · Viewer. Ownership scoping server-side on every endpoint; viewer is read-only platform-wide.

AUTHENTICATION

bcrypt hashing · 30-minute access tokens · rotating single-use refresh tokens with revocation · login rate limiting · closed registration.

SECRETS

SMTP credentials encrypted at rest (Fernet); API keys hashed; webhook secrets shown once.

INTEGRATION

REST API (220+ endpoints) · `ik_` API keys with the owner's RBAC · HMAC-SHA256 webhooks · CSV import / export.

DATA PLATFORM

PostgreSQL · 55 tables · 183 indexes · Alembic migrations · unique sequence-backed numbering · 47 automated tests.

STACK

Python FastAPI · React + TypeScript · dedicated worker process · HTTPS.

DEPLOYMENT

Cloud SaaS or on-premise · UAE data residency · dedicated database per customer.

See it run on your own leads and deals.

Bring a spreadsheet of leads and last quarter's pipeline. We'll show conversion, automation, quoting and the AI assistant on your data — live.

sales@integraontrack.com

+971 55 222 0975 · WhatsApp

crm.integraerp.tech